inquisite®

**Respondent Management Module**

Version 8.0

## Administrator's Guide

June 2007 Edition of Respondent Management Module Administrator's Guide

# Contents

# Preface

This manual provides the information you need to work with the Respondent Management Module (RMM), a web-based application for creating and managing panels, survey campaigns and reporting for Inquisite surveys. The Inquisite Survey System is an enterprise solution designed specifically for non-technical users to create surveys on the desktop and deploy them to the web.

## Support

For technical help, contact Customer Support during business hours Monday through Friday 8:00 AM—5:00 PM (CST).

support@inquisite.com

512.328.2943

## 1 Introduction

The Inquisite Survey System is an enterprise solution designed specifically for non-technical users to create surveys on the desktop and deploy them to the web. The Respondent Management Module (RMM) is a web-based application that centralizes the management and creation of proprietary samples (or panels), campaigns and reporting for Inquisite surveys. The RMM lets you import data from your customer and employee databases to create custom panels of respondents. The RMM also provides an additional communication channel with a respondent portal that is personalized for each respondent.

This guide introduces the RMM and describes the basic steps in launching a survey campaign.

### Key features and benefits

The following table provides an overview of the RMM's capabilities.

| FEATURE | DESCRIPTION |
|---|---|
| **Data Import** | Lets you import data from your customer and employee databases—leveraging your organization's CRM or BI systems—to create custom panels of respondents (employees or customers). You can use data you have already collected to prepopulate survey questions. |
| **Survey Administration** | Centralizes the control and management of surveys and respondents. If you are logged in as a survey administrator, you can quickly navigate between the RMM and Survey Administration web portals to centrally manage data collection. You will use the Survey Administration site to preview and activate surveys. After the survey is complete, you can use the Survey Administration site to generate online reports and export data. |
| **Campaign Management** | Set up and save a campaign by selecting a survey and one or more samples, setting up prepopulation, and scheduling the invitation and reminders. You can use the RMM's email-based invitation management system or push surveys to respondents' portals and notify them with your preferred method of communication.<br>Campaign management in the RMM includes these features:<br>▪ The **campaign list** displays the status and campaign statistics of all active projects. This overview page lets you see at a glance which projects might need attention.<br>▪ Avoid survey fatigue among your respondents by selecting **fatigue management** settings that exclude respondents if they have been invited to or completed a survey in a time period you specify.<br>▪ The **Set Up Mail** page lets you set up studies ahead of time. With "Set and Forget Scheduling," the RMM makes the survey available to respondents on the date you set. You can save an email invitation or reminder as a template to use later or create email message templates separately. Share email invitation and reminder templates or make them private.<br>▪ **Multiple reminders** are also available through the **Set Up Mail** page. Schedule reminders when you send out invitations or wait until after launching a campaign and are tracking responses.<br>▪ **Campaign tracking** provides details such as the number of completed and in-progress surveys. With **respondent tracking**, you can drill down to respondent level detail to measure respondent activity and send reminders if needed. |

| FEATURE | DESCRIPTION |
| --- | --- |
| **Sample Management** | Create samples to build customer and employee panels. Save samples to re-use across future surveys and campaigns. Sample management includes these features:<br>▪ **Segmentation** lets you filter your database to create samples from subsets of your database population, letting you survey the demographic you need to reach. For example, you may want to survey only regional sales managers in a specific geographic area. To accomplish this, you will first define the sample of respondents. Typically, you will then select one or more filtering criteria and create the sample. Because this **dynamic** sample is linked to the database, the sample is updated at survey launch time to reflect any changes in the database.<br>Alternately, you can add respondent names manually to create a **static** sample.<br>▪ **Importing static samples** lets you push information through to surveys to leverage as part of your analysis on the backend. With prepopulation, survey takers will not have to provide information you already have.<br>▪ **Static and dynamic samples** allow you to rely on a population that you can filter and build to use today or update when you send it out a week from now. |
| **Shared Questions** | You can create key metric questions within the RMM that are available for use in the Survey Builder when creating surveys. After you create a shared question in the RMM, it cannot be changed. Because the question does not change—the content is centrally controlled—better data is collected over time.<br>If your organization uses Inquisite's Employee Appraisal Management (EAM) system, you can track shared questions across applications by including one or more shared questions in a survey and collecting the survey data in an employee appraisal. |
| **Survey Portal** | If you are an application user and have surveys to take, you can connect to a list of surveys along with their due dates. Clicking the name of a survey displays the survey for you to take. If you are logged in as a respondent, you will see this view only; administrative tasks are not displayed for the respondent. |

## Inquisite product overview

The Inquisite Survey System includes a full-range of products that let you manage the entire survey process, from building and publishing a survey to analyzing the completed survey's results.

The following table describes how you may use the different components in Inquisite's suite of products. Depending on your organization, one or multiple users will accomplish these tasks.

| SURVEY BUILDER | SURVEY ADMINISTRATION SITE | RESPONDENT MANAGEMENT MODULE | SURVEY ADMINISTRATION SITE OR REPORTING PLUG-IN |
|---|---|---|---|
| | | **Step 1**<br>Prepare the population or import a static sample. | |
| **Step 2**<br>Build a survey. | **Step 4**<br>Preview the survey.<br>Return to Survey Builder if additional edits are required. | **Step 6**<br>Build one or more samples. | **Step 10**<br>Analyze and share survey results.<br>▪ From the Survey Administration site, generate online reports.<br>▪ With the Reporting Plug-in, create reports in Excel and PowerPoint. The Reporting Plug-in can benchmark campaigns and display campaign results in a cross tab. |
| **Step 3**<br>Publish the survey. | **Step 5**<br>Activate the survey. | **Step 7**<br>Set up invitation and reminder email templates. | |
| | | **Step 8**<br>Set up survey campaign by:<br>▪ Scheduling the survey's open and close dates.<br>▪ Selecting a survey and one or more samples.<br>▪ Setting up email invitations and reminders.<br>▪ Launching the campaign. | |
| | | **Step 9**<br>Track the campaign details of your survey.<br>If needed, send out additional reminders. | |

If you have purchased Inquisite's Employee Appraisal Management (EAM) system, you can use survey results—from customers or other employees—to evaluate an employee's performance by including responses to shared questions in that employee's appraisal.

For more information about other components in the Inquisite suite of products, visit Inquisite's web site at [inquisite.com](inquisite.com)

## Overview: Navigating the Inquisite product suite

If you are logged in as an RMM application user, you can access the Inquisite Survey Administration site directly from the RMM. You will use the Survey Administration site to preview and activate surveys. After you are finished collecting survey results, you can use the Survey Administration site to generate online reports and export data.

**NOTE**: To log into the RMM as an application user, you must be granted **Survey** or **Site Administrator** rights in the Survey Administration site. Your Inquisite System Administrator sets these rights at:
**System Administration>Account Administration>Account Privileges**

### *Accessing the Survey Administration site*

To open the Survey Administration site from the RMM, click the **Survey Administration** tab near the top of the screen.


To return to the RMM, click the **Respondent Management** tab.

### *Taking a survey*

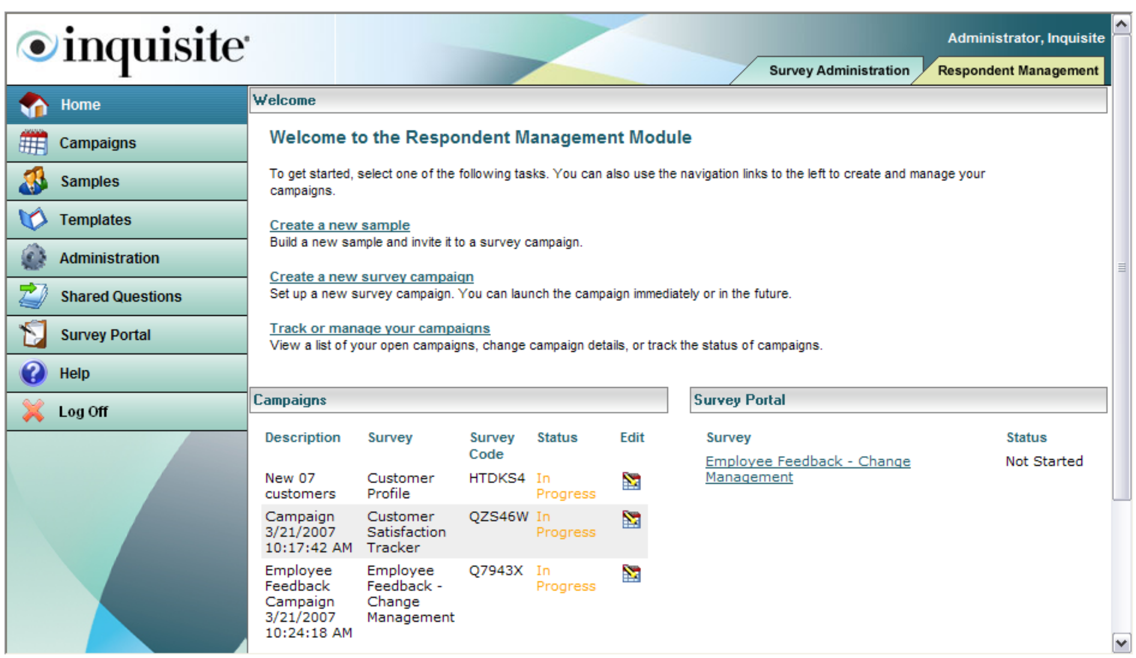
To take a survey, complete these steps:

**1** Log into the RMM.

For respondents, the **Survey Portal** displays surveys, along with their status and due dates.

-OR-

If you are logged in as a survey administrator, open surveys are displayed in the **Welcome** screen under **Survey Portal**. Or, you can click **Survey Portal** from the left navigation bar, which displays additional options.




**2** To take a survey, click the name of the survey.

# 2 System Requirements

This section explains the requirements for successfully using the RMM.

## Web survey respondents and Inquisite survey analysts

The RMM is supported on the following browsers:

- Internet Explorer 6.0 and 7.0
- Firefox 2

## Inquisite survey administrators

Survey administrators create surveys and email invitations.

### *Software*

- Microsoft Windows 2000, Windows 2003, Windows XP or Windows Vista
- Internet Explorer 6.0 and 7.0
- Firefox 2

### *Hardware*

- Pentium or compatible processor with speed of 1 GHz or better
- 1024x768 video resolution or better
- 512 MB memory or better
- Mouse

## Inquisite Reporting Plug-in for Microsoft Office

The Inquisite Reporting Plug-in for Microsoft Office requires the .NET Framework v2.0. If you have Internet access, then you can download the framework as part of the installation process. If you do not have Internet access, then you will need to acquire the .NET Framework v2.0 and install it before you run the Reporting Plug-in install.

**NOTE**: The Reporting Plug-in Version 8.0 **cannot** be installed concurrently with an earlier version of the Plug-in. If you have an earlier installed version of the Plug-in and want to upgrade to version 8.0, use the Windows **Add or Remove Programs** tool to uninstall the Plug-in before upgrading.

The Inquisite Reporting Plug-in requires one of the following versions of Microsoft Office:

- Microsoft Office 2003
- Microsoft Office XP
- Microsoft Office 2000

# 3 Importing Respondents into the RMM

Importing data from your customer and employee databases lets you use your organization's existing systems to create custom panels of respondents. The panels can consist of employees or customers. Because the information from the imported data can be passed directly through a survey for analysis (by prepopulating survey questions), importing user data lets you leverage an employee or customer database when you invite respondents to a survey.

Panels consist of **respondents**, who log into the RMM to take surveys only. In contrast, **application users** log into the RMM to manage samples and survey campaigns (as **survey administrators**); or to perform administrative tasks in the RMM (as **site administrators**).

To import respondents into the RMM, you must be granted **Site Administrator** rights in the Survey Administration site. Your Inquisite System Administrator sets these rights at:

**System Administration>Account Administration>Account Privileges**

With the RMM you can import user information in the following ways:

- **Import user data into your existing population**. A **population** is the entire aggregate of respondents from which **samples** can be created. With the user data in the population, you can create dynamic and static samples. A **dynamic sample** will be updated with new user data if the population changes. If you create a dynamic sample, you can define filters that create samples that are segments of the population. With a **static sample**, you can create a segment of the population by manually adding or deleting respondents. The static sample does not change unless you add or delete users. For instructions on this process, see "Importing user data into your existing population" on this page.
- **Create a sample by importing a delimited file to be used as a static sample**. When you import user data in this way, you cannot filter the sample or change it in any way. For instructions on this process, see "Creating an imported static sample" on page 18.
- **Convert existing email lists from the Inquisite Invitation Management system**. You will convert these email lists (one at a time) to new imported samples in the RMM. When you import user data in this way, you cannot filter the sample or change it in any way. For instructions on this process, see "Importing email lists from the Inquisite Invitation Management system" on page 22.

## Importing user data into your existing population

You will complete these general tasks when you set up a population of respondents from a database import:

**Task 1**: Prepare the database to be imported into the RMM.

**Task 2**: Create custom attributes.

**Task 3**: Import the database.

**Task 4**: Set up users.

**NOTE**: Tasks 1 and 2 can be completed in any order before Tasks 3 and 4.

### *Task 1: Prepare the database file to be imported into the RMM*

Prepare the database you will import *before* the import process. When the database you import includes headers that have the same name as the required and custom attributes you will map during the import, the mapping process is faster.

The database file you import into the RMM must follow these requirements:

- The file must be delimited (comma- or tab-separated, for example).

- The file must include a field that can serve as a unique ID identifying the person on all future imports—customer or employee IDs, for example. If a user does not have a unique ID, you can copy the email or user name in the database file and use the email or user name as the unique ID.

To set up login capability for a respondent—so the respondent can log into the respondent portal—ensure that the imported file includes these headers that will serve as attributes when the file is imported into the RMM, remembering that these attributes must be unique for each respondent:

- UniqueID
- UserName or Email

To prepare the database file, complete these steps:

1. Export the database file as a delimited file.
2. Open the database file you want to import into the RMM.
3. Ensure that the file includes a header row and fields that serve as **UniqueID** and **UserName** or **Email** (serving as login name for the RMM respondent portal). Coordinate the header names in this file with any custom attributes that you create.

### *Task 2: Create custom attributes*

You will create custom attributes to map to field headers in the import file. Defining custom attributes makes them available as filters when you create a sample or prepopulate survey questions.

The following system attributes are available also to map to field headers in the import file. These reserved attributes cannot be edited.

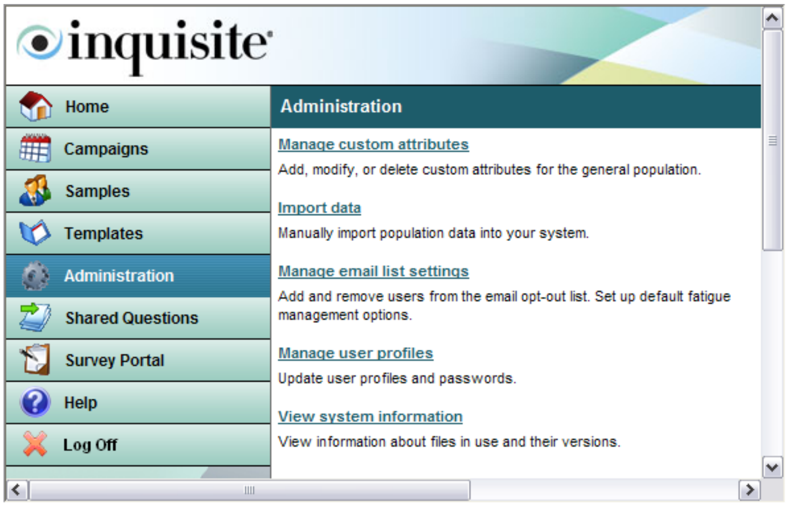
| | | | |
|---|---|---|---|
| UniqueID (required) | Last Name | City | Work Phone |
| User Name or Email (required) | Employee Number | State/Province | Home Phone |
| First Name | Address | Postal Code | Mobile Phone |

Consider the following when you create custom attributes:

- Create attributes that match the field headers in the delimited file you import into the RMM. This simplifies the mapping process.
- If a custom attribute is deleted, any samples that use that attribute may be invalid. Additionally, data stored in the attribute is deleted. An attribute is “in use” if it is used in the filter of a dynamic sample. The RMM marks a sample that uses one or more invalid attributes with a warning symbol; additionally, you will be unable to launch a campaign that uses an invalid sample. If a custom attribute is deleted after a campaign is launched, resulting in an invalid sample, the campaign will not be processed.
- You cannot delete a pick list item if any instances of the pick list item are in use.
- You cannot edit the name or data type of a saved custom attribute.

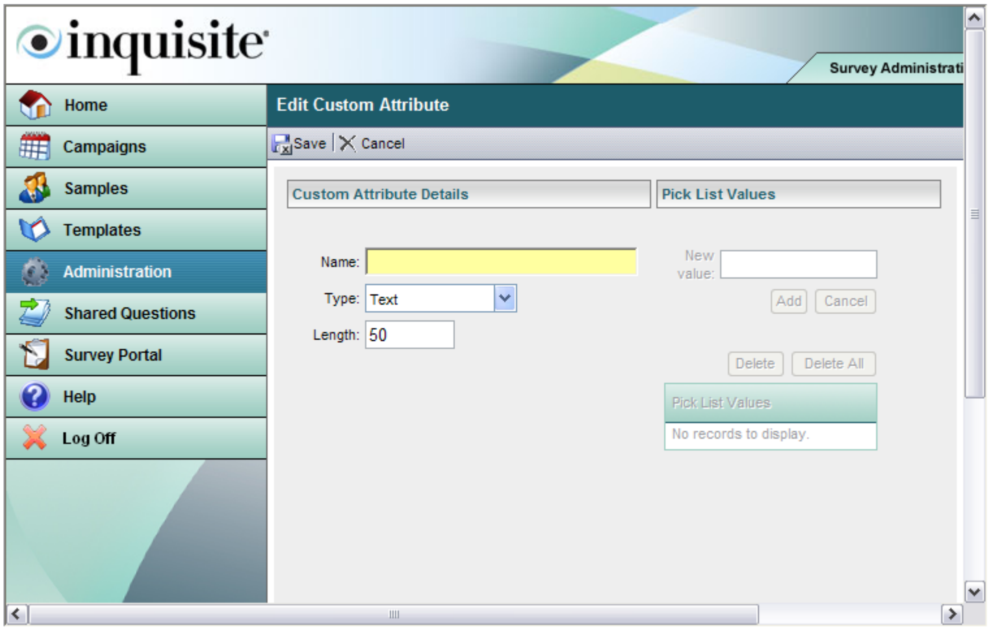
To create a custom attribute, complete these steps:

1 From the **Administration** screen in the RMM, click **Manage custom attributes**.




The **Custom Attributes** screen is displayed.

2 From the toolbar, click **New** to display the **Edit Custom Attribute** page.




3 Enter the new custom attribute's **Name** and **Type**.

A custom attribute's name must follow these conventions:

- The first character must be a letter (**a** through **z** or **A** through **Z**).
- After the first character, the custom attribute's name can contain any combination of letters (**a** through **z** or **A** through **Z**) and numbers (**0** through **9**).
- Non-alphanumeric characters, including dashes (**-**), underscores (_) and periods (**.**) are not allowed.
- Extended 8-bit ASCII characters, for example é, are not allowed.
- The custom attribute name cannot contain embedded spaces.

Valid values for **Type** include **Text**, **Number**, **Pick List** and **Date**. A custom attribute's type determines what filters are available when creating dynamic samples or prepopulating survey questions.

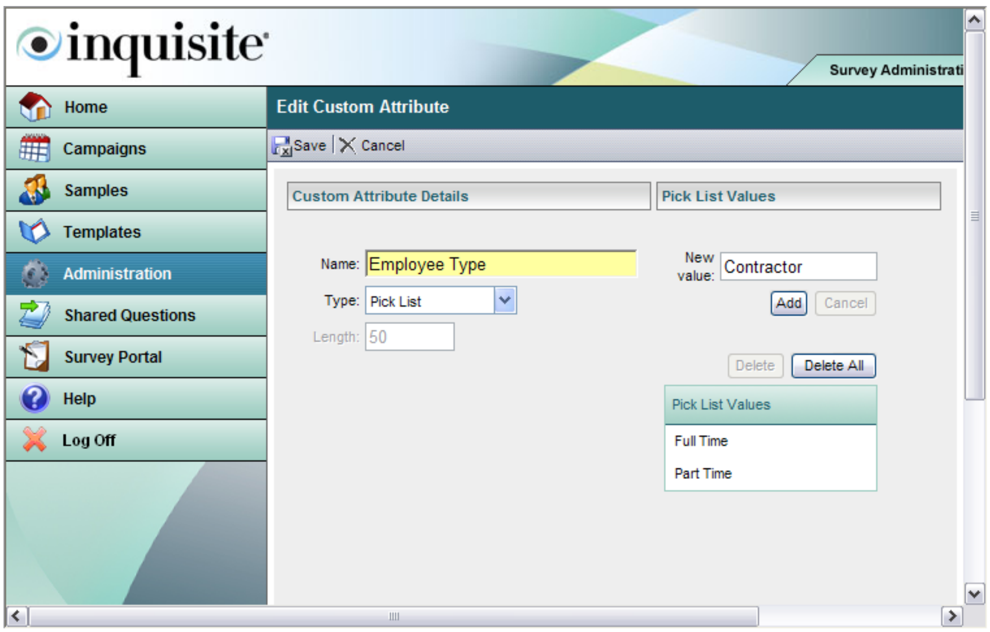
The following table displays filtering criteria by attribute type.

| | **Custom attribute types** | | | |
|---|---|---|---|---|
| **Filtering criteria** | **Text** | **Number** | **Pick List** | **Date** |
| Equal | X | X | X | X |
| Not Equal | X | X | X | X |
| Contains | X | | | |
| Begins with | X | | | |
| Ends with | X | | | |
| Greater than | | X | | |
| Less than | | X | | |
| Before | | | | X |

| | Custom attribute types | | | |
|---|---|---|---|---|
| **Filtering criteria** | **Text** | **Number** | **Pick List** | **Date** |
| After | | | | X |

If you select **Text**, you must also define the attribute's length. The maximum length of a text attribute is 255 characters.

Pick lists are used for custom attributes with a finite number of options. You might use a pick list to more easily filter samples. For example, an *Employee Type* attribute might be defined as a pick list, with *Full Time*, *Part Time* and *Contractor* as its values.




If you select **PickList** as its type, enter the values for the pick list, clicking **Add** after you enter each value.

**4** When finished, click **Save**.

### *Task 3: Import the database*

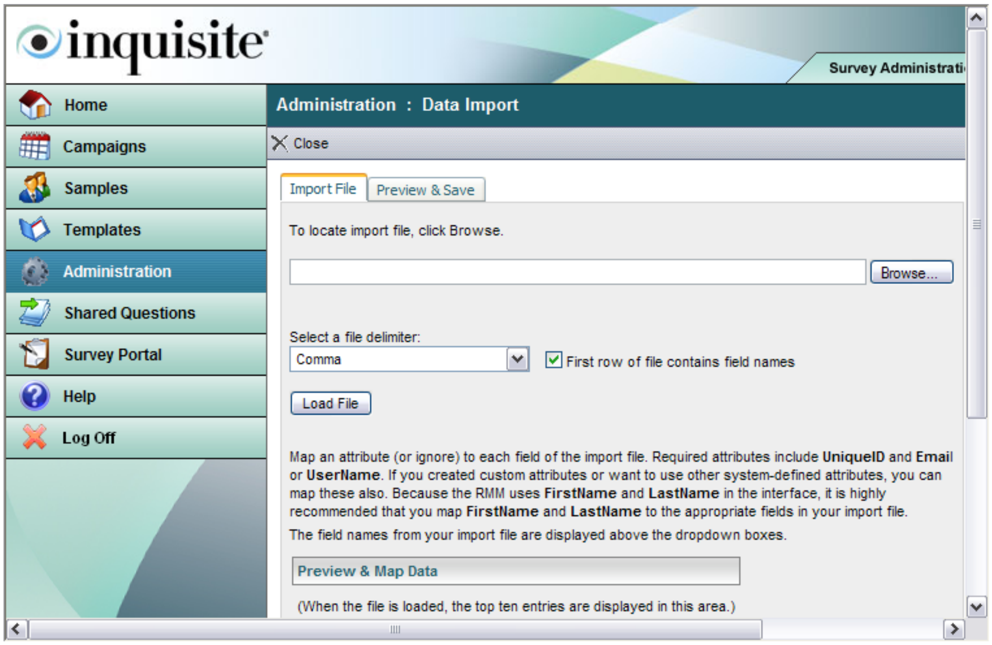
Importing a database maps user names (or login names) to the RMM login tables, creating (or adding to) a population of respondents. All user names created with this process are **respondents**, users who take surveys. In contrast, **application users** in the RMM are survey administrators.

If the import file includes duplicates of the email or user name, you will see a message informing you that the system encountered duplicates and did not import the duplicate record.

When your external database changes, you can import the updated file into the RMM again. As part of the import process, the RMM examines the **UniqueID** of each record; duplicate records are updated, and new records are imported as new records.

To import a database, complete these steps:

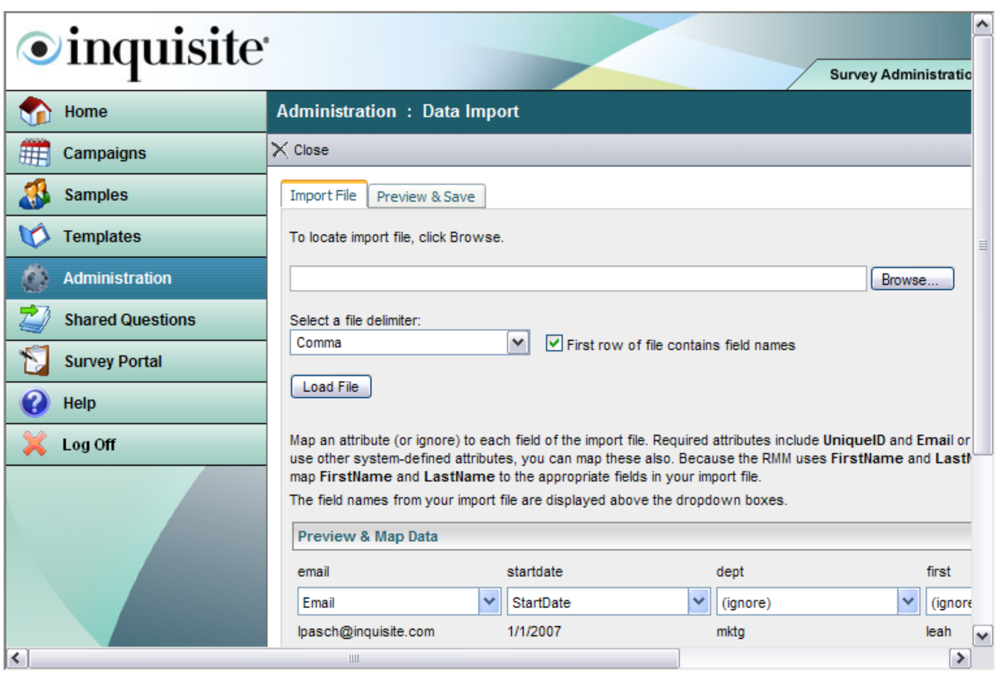
1 From the **Administration** screen in the RMM, click **Import data** to display the **Data Import** page:




2 Click **Browse** to locate the delimited file to import.

3 Click **Load File**.

The file contents are displayed below **Preview & Map Data**. Depending on your import file, you may need to scroll to the right to see all of the imported fields.



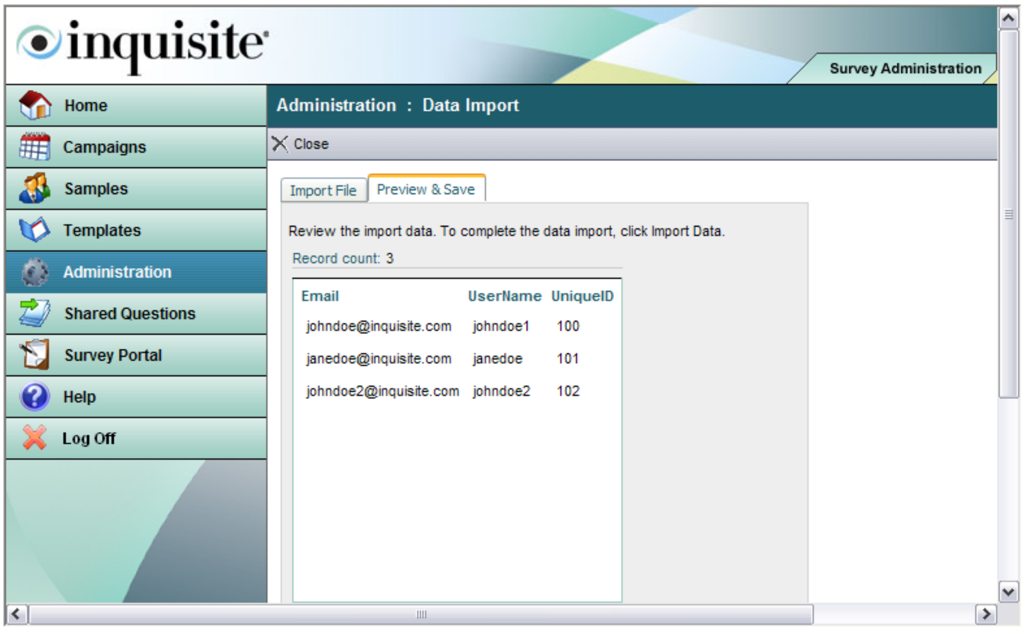

4 Using the header dropdown lists above each column of the newly loaded file, map a field from the file to a required field. Required fields include **ID** and **UserName** or **Email**. If you created custom attributes or want

to use other system-defined attributes (such as **FirstName**, **LastName**, for example), you can map these also.

**NOTE**: Because each column must be mapped to a required or custom attribute or marked **(ignore)**, the RMM matches column headers with existing attributes and sets any other headers to **(ignore)**.

**5** Click **Preview & Save**.

**6** The **Preview & Save** page displays the user data you selected to import. Any data you marked **(ignore)** is not displayed.




If the import data is correct, click **Import Data**.

You will see status of the import. If the import process encountered duplicate records, you will see a message listing the records that were not imported.

### *Task 4: Invite users to a campaign*

When you import a database file into the RMM, respondents are assigned user names so they can log into their respective respondent pages. Typically, you will communicate portal login information to respondents through email. The following section describes this process.

When you create a survey campaign, you can invite users to participate in the survey through email you create in the **Set Up Mail** screen (displayed when a campaign is created). You can also include a link to the RMM respondent portal, where the survey link is displayed. The first time respondents access the respondent portal, they will be asked to reset their passwords. After that, respondents can log in to the portal directly with their login and password.

For more detailed instructions about creating campaigns, see “Creating a Survey Campaign” on page 23.

To invite a user to a survey, complete these steps:

**1** From the left navigation bar, click **Campaigns**.

**2** From the RMM toolbar, click **New**.

**3** From the **Define Campaign** screen, enter a name for the campaign, along with open and close dates.

**4** Select one or more samples to invite to the campaign.

5 Click **Select Survey**.

6 From the **Select Survey** screen, select a survey and any prepopulation settings. You can use custom attributes you defined for prepopulating survey questions.

7 Click **Set Up Mail**.

8 From the **Set Up Mail** screen, write, format and schedule the email message you will send to respondents.

- To include a link to the survey, select the desired email text and then **Custom Links>Survey**. New users (without passwords) can access the survey through this link.
- To include a link to the respondent portal, select the desired email text and then **Custom Links>Respondent page**. New users (without passwords) will be asked to first create a password before they access the site.

  The respondent portal also requires a user name. In your email to respondents, instruct them to log in with their email address. To include the email address in the email, select **Insert Tag>Email**.

  **NOTE**: If your respondents do not have email, you may have set up user names instead of email addresses for the respondent portal login. In this case, you will communicate user names through a different channel.
- To include an option to opt out of future email invitations, select the desired email text and then **Custom Links>Opt-out page**. If a respondent clicks this link, that email address is added to the opt-out list, exempting the email address from future emails.

9 To launch the survey campaign, click **Review** and then **Launch**. Launching a survey makes it available to respondents at the open date you defined.

## Creating an imported static sample

An imported static sample is created by importing a delimited file much the same as the data import process described in the preceding section, except that an imported static sample cannot be filtered or changed. Additionally, respondent login names are *not* created for an imported static sample. You will invite respondents in an imported static sample to take a survey by providing the respondents an email link to the survey.

**NOTE**: You can use the attributes imported from imported static sample to prepopulate one or more survey questions.

You will complete these general tasks when you set up an imported static sample:

**Task 1**: Prepare the delimited file to be imported into the RMM. An email address is required for each respondent.

**Task 2**: Create the sample.

### *Task 1: Prepare the delimited file to be imported into the RMM*

To prepare the delimited file to be imported into the RMM, complete these steps:

1 Open the delimited file you want to import into the RMM.

2 Ensure that the file includes a header row and one **Email** field with each user’s email address.

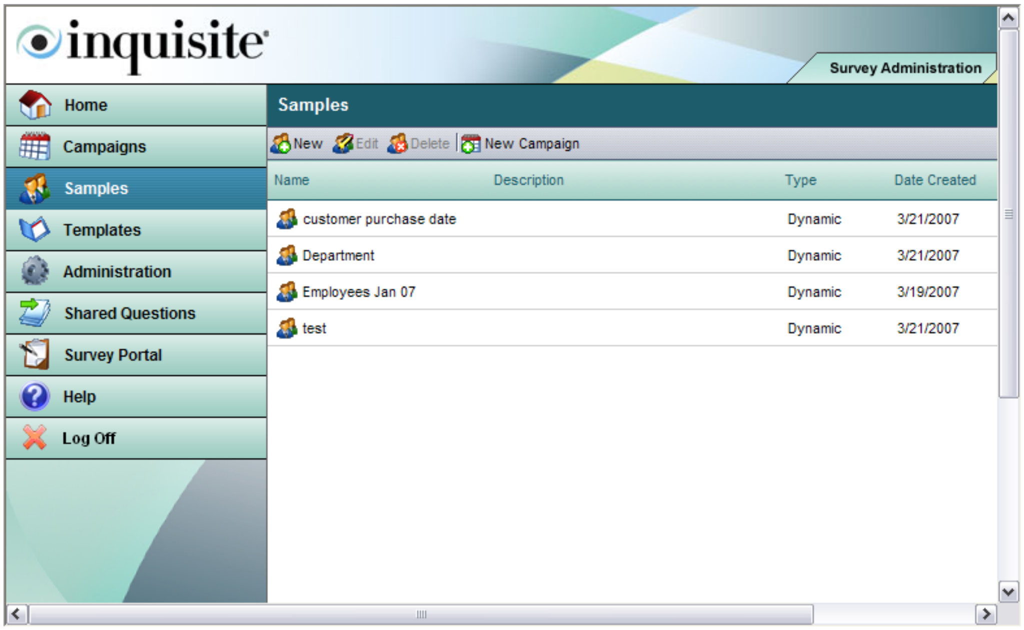
**NOTE**: **Email** is a required field.

### *Task 2: Create the imported sample*

To create a new imported sample, complete these steps:

**1** From the left navigation bar, click **Samples**.

The **Samples** screen displays a list of previously created samples.




**2** From the RMM toolbar, click **New**.


**3** From the **Define Sample** page, enter a name and description for the sample, and then click **Select Sample Type**.

The **Select Sample Type** page displays sample types supported by the RMM.

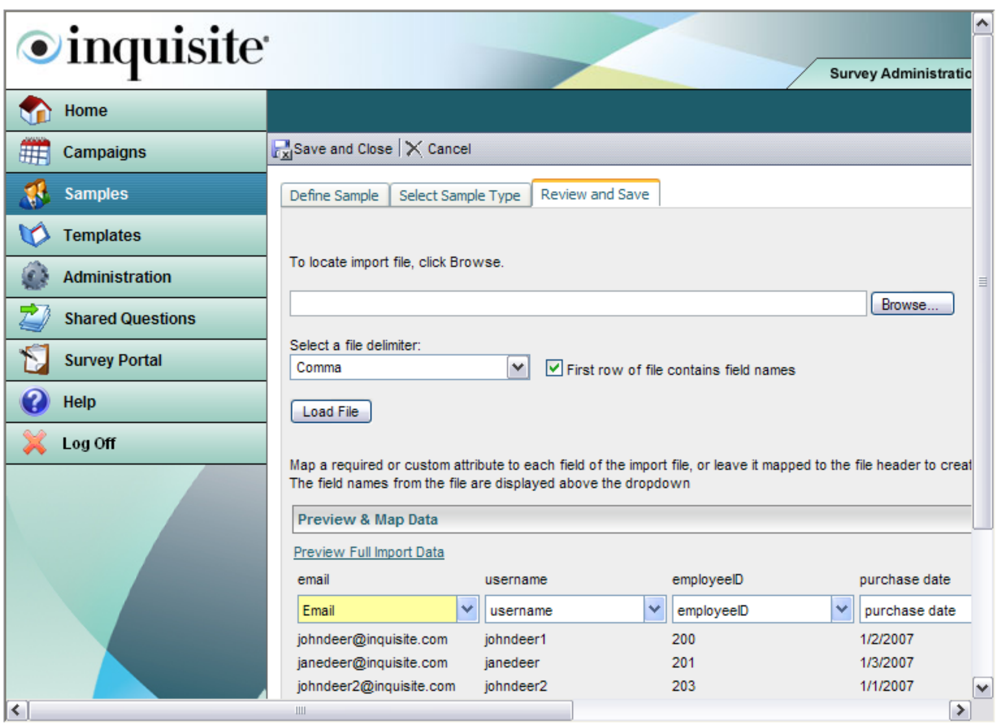

4 From the **Select Sample Type** page, select **Import a list of respondents from a delimited file** and then **Review and Save**.

The **Review and Save** page is displayed.


5 To locate the delimited file to import, click **Browse**.

6 Click **Load File**.

The **Review and Save** page displays the imported file.




7 Using the header dropdown lists above each column of the newly imported file, map a field from the imported file to a system field, or type a new field name, remembering that **Email** is a required field for this type of sample.

8 When finished, click **Save and Close**.

   The sample is available to include in a survey campaign.

## Importing email lists from the Inquisite Invitation Management system

When you import an existing email list from the Inquisite Invitation Management system into the RMM, the list is converted into an ad hoc sample. Additionally, respondent login names are *not* created for an ad hoc sample. You will invite respondents in an ad hoc sample to take a survey by providing the respondents an email link to the survey.

To convert an existing email list from the Inquisite Invitation Management system, complete these steps:

1. From the left navigation bar, click **Samples**.
2. From the RMM toolbar, click **New**.
3. From the **Define Sample** screen, enter a name and description for the sample, and then press **Select Sample Type**.
4. From the **Select Sample Type** screen, select **Import an email list from the Inquisite Invitation Management System** and then **Review and Save**.
5. From the **Review and Save** screen, click the down arrow to locate the list to import and then **Load Email List**.
6. Using the header dropdown lists above each column of the newly imported file, map a field from the imported file to a system field, or type a new field name. Including this sample in a campaign makes these field names available for prepopulating survey questions.
7. When finished, click **Save and Close**. The sample is available to invite to a survey campaign.

# 4 Creating a Survey Campaign

A **survey campaign** is a project in which you invite one or more samples to complete a specified survey. You can use Inquisite's email-based invitation management system or push surveys to respondents' portals and notify them with a different method of communication.

**NOTE**: Samples and campaigns are unique to each survey administrator.

Launching and managing a survey campaign involves the following general tasks:

**Task 1**: Create a new sample (if not done already).

**Task 2**: Create a new survey campaign.

## Task 1: Create the sample

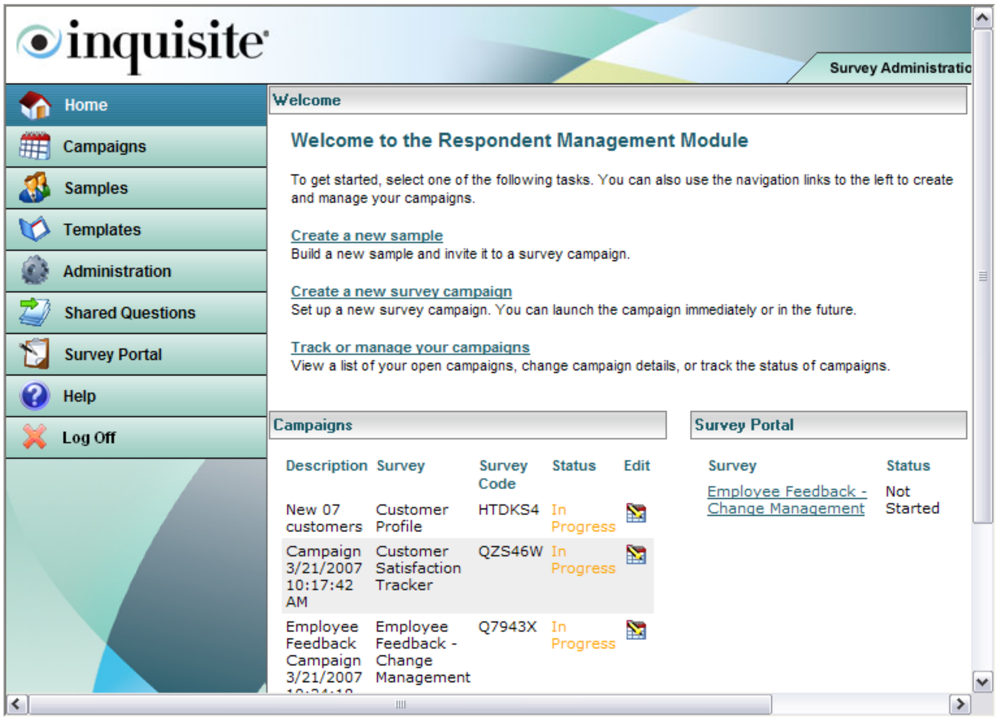
A **sample** is a subset of employees or customers from the database population. Creating a sample segments the database according to criteria you define. You will invite one or more samples to a survey campaign. With the RMM, you can create a **static** or **dynamic** sample. The following table describes these sample types.

| SAMPLE TYPE | DEFINITION | PROCEDURE |
|---|---|---|
| **Dynamic** | A sample of respondents created by filtering your company database. If changes are made to the database when the survey campaign is launched, the sample is updated automatically to reflect these database changes. | Create a dynamic sample by defining one or more filtering criteria. **Filtering** narrows the size of the sample.<br>For example, to define a sample of all sales representatives, you might select **Position** equals **Sales Representative** for one filtering rule. You can select more than one filtering criterion for a single rule by clicking the criterion. The RMM uses Boolean OR logic to return respondents that fulfill either request.<br>To narrow the scope of the sample further, create two or more filter rules. With two (or more) filter rules specified, the RMM uses the Boolean AND operator to return respondents that fulfill both requests. That is, only the respondents that fulfill both of the rules are added to the sample. |
| **Static** | A sample of respondents that does not change. | Create a static sample in one of the following ways:<br>▪ Manually add respondents to or delete respondents from a dynamic sample.<br>▪ Convert a dynamic sample to a static sample. |
| **Imported Static** | A sample of respondents that does not change. You may import a static sample as part of follow-up to an event, for which you are soliciting event feedback. | Create an imported static sample in one of the following ways:<br>▪ Import respondents in a delimited file.<br>▪ Convert an existing email list from the Inquisite Invitation Management system. |

To create a new sample, complete these steps:

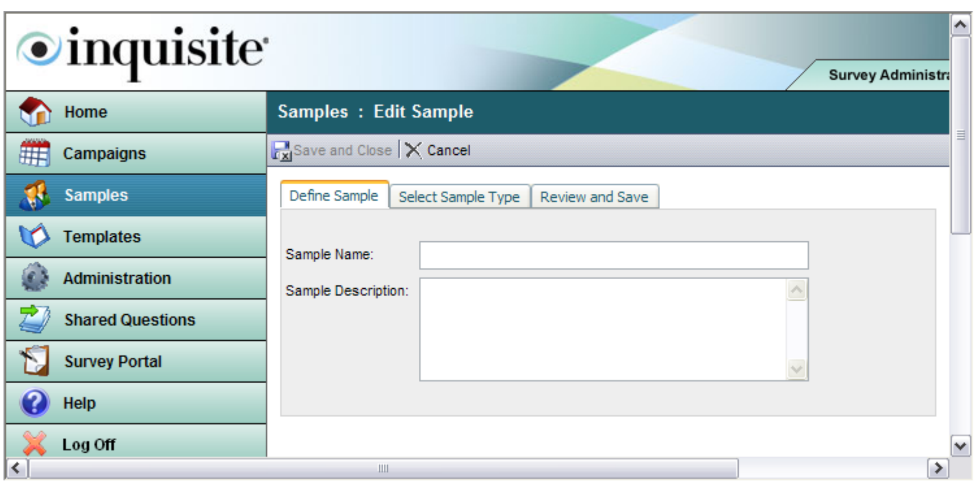
**1** Log into the RMM.

The **Home** screen displays the status of your campaigns.




**2** Click **Create a new sample**. Or from the left navigation bar, click **Samples**; and then **New**.

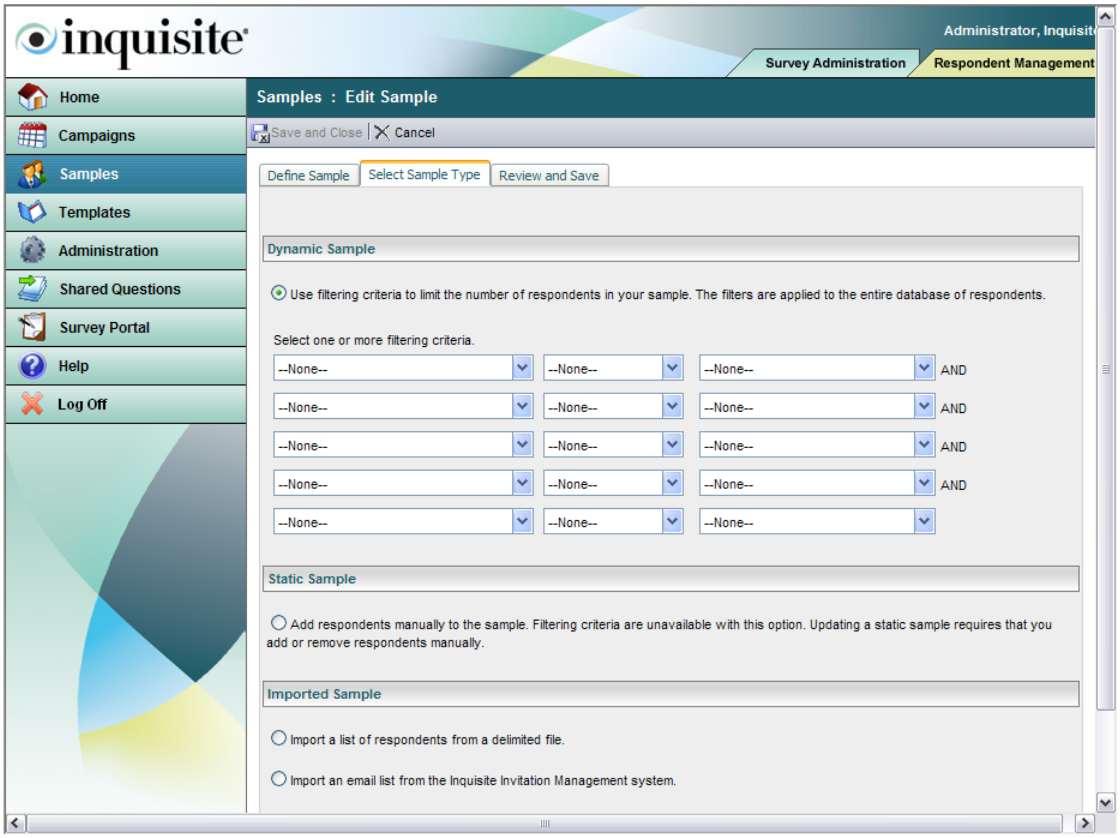
The **Define Sample** page is displayed.




Type a name and description for the sample.

**3** When finished, click the **Select Sample Type** tab.

The **Select Sample Type** page is displayed. By default, a **Dynamic Sample** is selected, with no filtering turned on. This setting includes all of the respondents in the population.




4 To create a dynamic sample, click **Use filtering criteria to limit the number of respondents in your sample**.

-OR-

To create a static sample, click **Add respondents manually to the sample**.

-OR-

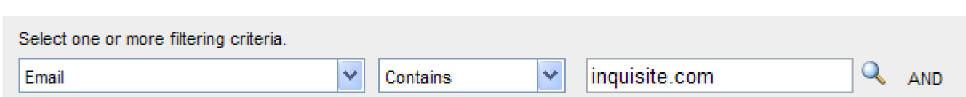
To import a static sample, click **Import a list of respondents from a delimited file**. To continue with this procedure, see “Creating an imported static sample” on page 18.

-OR-

To import an email list from Inquisite, click **Import an email list from the Inquisite Email Invitation System**. To continue with this procedure, see “Importing email lists from the Inquisite Invitation Management system” on page 22.

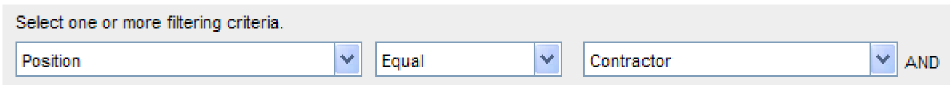
5 If you are creating a dynamic, filtered sample, define filtering criteria. Filtering narrows the size of the sample.

For example, to define a sample that includes all respondents that have the same email domain, you might specify *Email Contains inquisite.com* for one filtering rule.

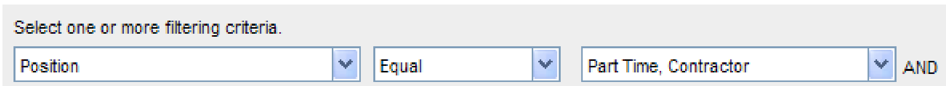


To preview values for the selected attribute, click the magnifying glass to the right of the row. The **Preview Attribute Values** dialog box displays valid values for the selected filter. To add a value, close this dialog box and type the desired value in the filter.

In another example, you might define a sample of all sales representatives by selecting *Position Equal Contractor* for one filtering rule.




For pick lists, you can select more than one filtering criterion for a single rule by clicking each criterion separately from the dropdown list. Selected pick list values are separated by a comma.

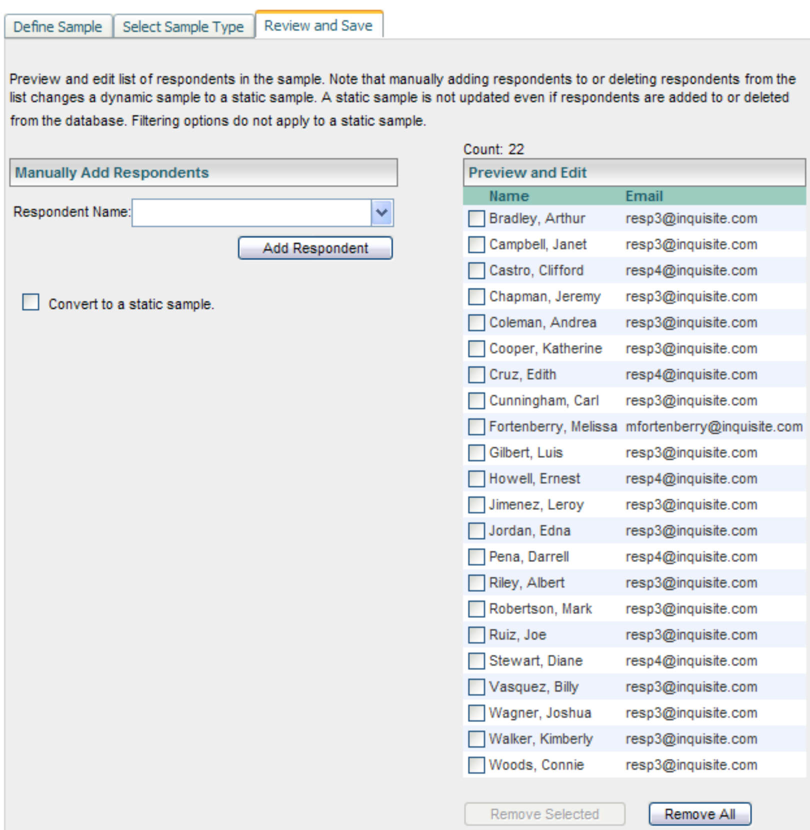



The RMM uses the Boolean OR operator to return respondents that fulfill either request. That is, respondents that fulfill either of the rules are added to the sample.

To narrow the scope of the sample further, create two or more filter rules. With two (or more) filter rules specified, the RMM uses the Boolean AND operator to return respondents that fulfill both requests. That is, only the respondents that fulfill both of the rules are added to the sample.

**6** When finished, click the **Review and Save** tab.

The **Review and Save** page is displayed. All of the respondents in your newly created sample are displayed below **Preview and Edit**. Use this screen to make changes to the sample.



7. To add a respondent to the list, select the respondent's name from the dropdown below **Manually Add Respondents** and then click **Add Respondent**.

   **NOTE**: Adding and deleting respondents converts a dynamic sample into a static sample. Changes to the population after the sample is created will not be reflected in a static sample.

8. To delete one or more respondents from the list, select the respondent's name from the **Preview and Edit** list and then click **Remove Selected**.

   When finished, you are ready to add the sample to a survey campaign.

## Editing a sample

To make changes to a sample, complete these steps:

1. Log into the RMM.
2. From the left navigation bar, click **Samples**.
3. The **Samples** screen displays samples you have created. Click the sample name and then **Edit**. (Double-clicking the sample name also opens the sample details.)
4. Details for sample are displayed. Make the desired changes.

## Task 2: Create the survey campaign

A survey campaign is a survey project in which you invite one or more samples to complete a specified survey.

**NOTE**: The date and time displayed for a campaign are determined by the server hosting the campaign. If you are an ASP customer, the campaign times are Central Standard Time (CST).

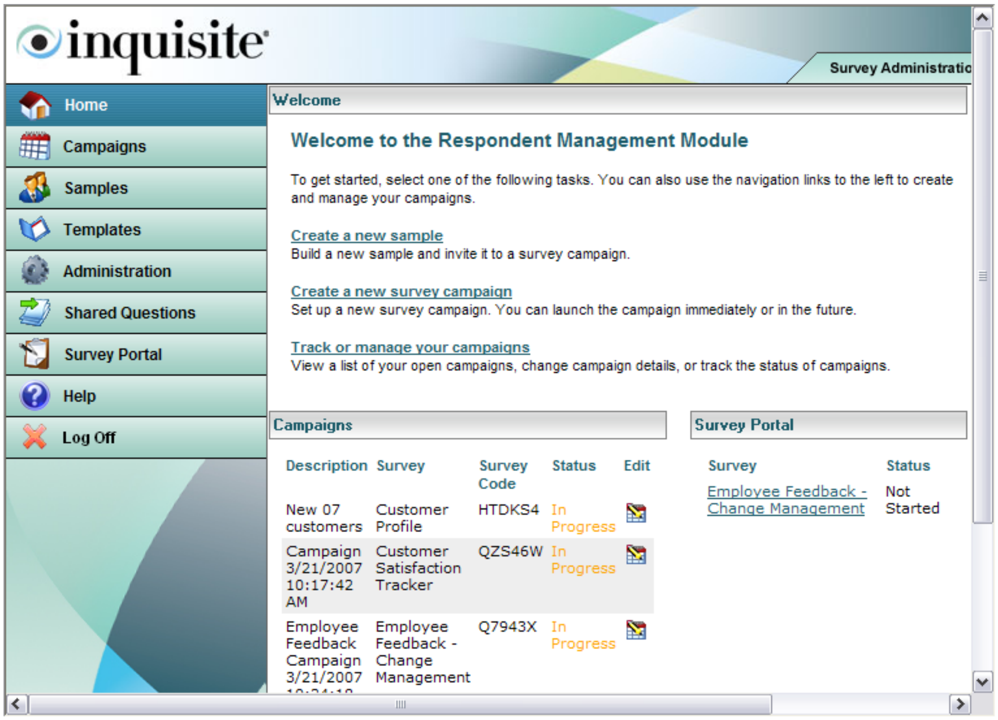
The following table outlines the tasks you will perform when you create a new survey campaign.

| TASK | DEFINITION |
|---|---|
| Define the campaign. | When you define the campaign, you will:<br>▪ Provide a description of the campaign.<br>▪ Specify open and close dates. You have the option of leaving the campaign open-ended. The close date will appear on the respondent portal as survey due date.<br>▪ Select one or more samples to invite to the campaign.<br>▪ Optional step: select a random subset of your selected samples.<br>▪ Optional step: select fatigue management settings. |
| Select a survey. | Available surveys are displayed in a dropdown list. You will see a **survey code** attached to each survey. This unique string identifies the survey across all Inquisite users at your organization. This code is a useful identifier if you need to troubleshoot issues with your system administrator.<br>To pass previously collected information into your survey, you can map custom attributes to survey questions. This is termed **prepopulation**. For example, your database may already include a respondent's **Job Title**. Mapping the **Job Title** custom attribute field to the **Job Title** survey question passes the information into the survey results without requiring the respondent to answer the survey question.<br>In the Survey Builder, you can hide a prepopulated survey question but still pass that information to the survey to use it for analysis. Hiding questions is useful for keeping sensitive information, such as a salary, confidential. |
| Set up mail (email invitations and reminders). | Use this screen to write, format and schedule email invitations and reminders to the sample(s) in your campaign. If you choose to invite your respondents with another method, you can choose not to send an email invitation. All reminders must be sent via email.<br>Message options include:<br>▪ Saving the message as HTML or text.<br>▪ Using an email template.<br>▪ Saving the current message as a template to use later.<br>▪ Spell check and find-and-replace.<br>▪ Inserting a link to the survey<br>▪ Inserting a link to the respondent's portal.<br>▪ Inserting a link to opt out of future emails. |
| Review and save campaign. | The campaign and correspondence details are displayed in this screen for you to review. This screen displays any corrections and additions that you are required to complete before being able to save and launch the campaign. |

To create a new campaign, complete these steps:

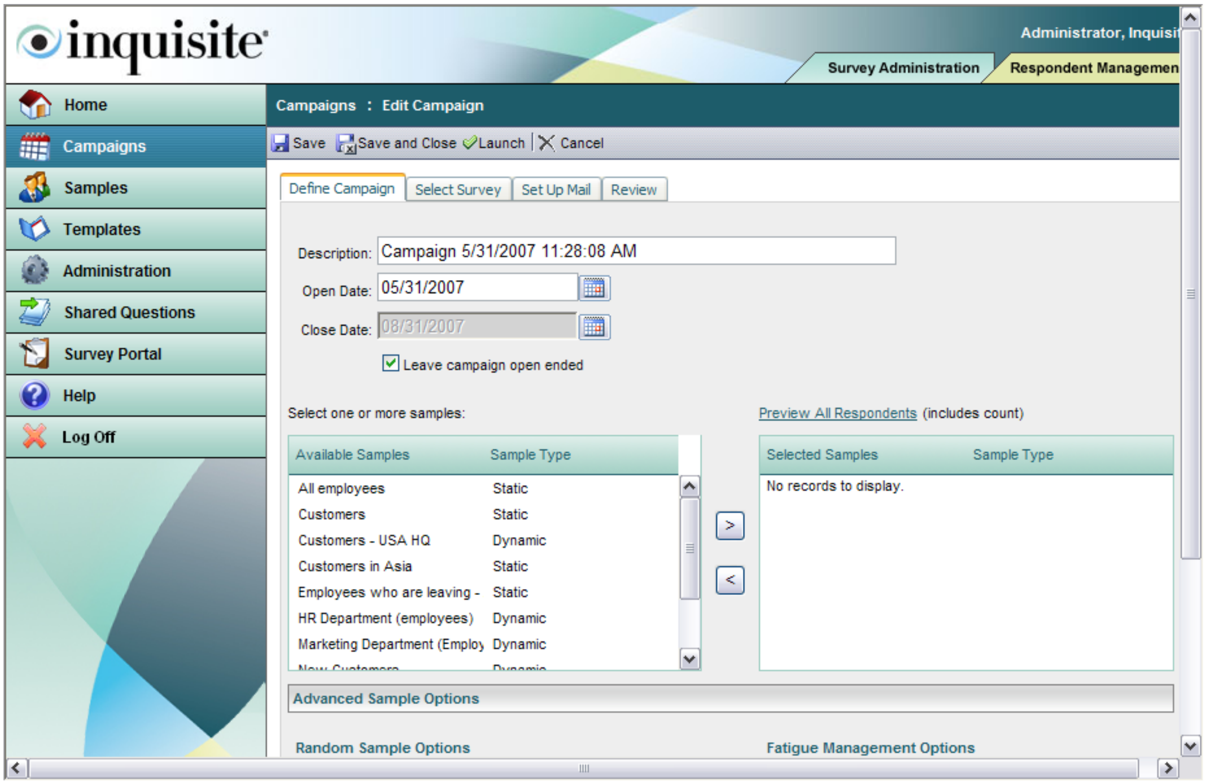
**1** Log into the RMM.

The **Home** screen displays the status of your campaigns.




**2** Click **Create a new survey campaign**. Or from the left navigation bar, click **Campaigns**; and then **New**.

The **Define Campaign** page is displayed.



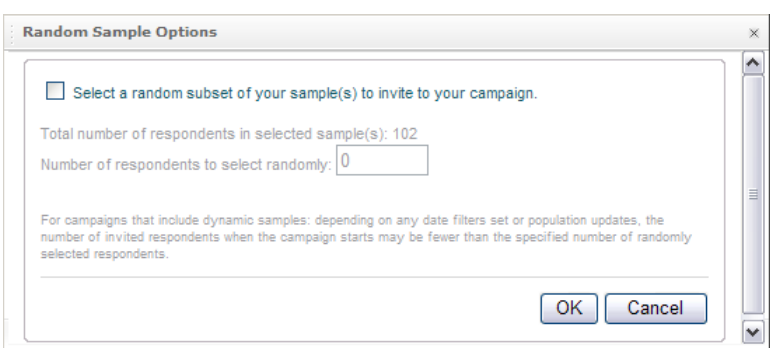

3 Type a description for the campaign and open and close dates. When a respondent logs into the respondent portal to take a survey, the close date appears as the survey due date. To quickly select dates from a calendar view, click the calendar button to the right of the date boxes. To leave the campaign open-ended, check the box below the close date box.

4 Select one or more samples to invite to the survey. From the list of **Available Samples**, select a sample and press the right arrow key, moving the sample name into the **Selected Samples** box. Continue this process until you have selected all of the samples you want to include in your survey campaign. Clicking **Preview All Respondents** displays a list of respondents from all of the samples you selected.

**TIP**: To quickly move a sample from one box to the other, double-click the sample name.

5 *Optional step*: To select a random subset of your samples, scroll down to **Advanced Sample Options** and click **Change Randomization Settings**.

The **Random Sample Options** dialog box is displayed.



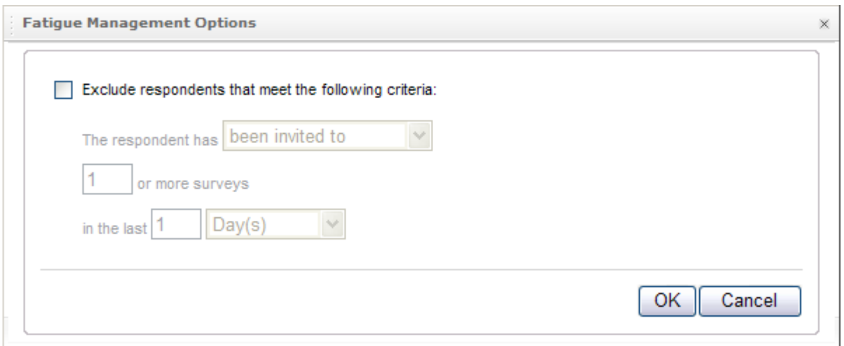
To turn on randomization, check **Select a random subset of your sample(s) to invite to your campaign** and then type the number of respondents to select randomly.

When finished, click **OK**.

If your campaign includes one or more dynamic samples, the number of invited respondents may be fewer than what you specify in the **Random Sample Options** dialog box. Date filters or population updates can change the total number of respondents to be fewer than your specified number of randomly selected respondents.

6 *Optional step*: To control for survey fatigue among your respondents, click **Change Fatigue Management Settings**.

The **Fatigue Management Options** dialog box is displayed.




Check **Exclude respondents that meet the following criteria** and define the following:

- Select from **been invited to** or **completed**.
- Type the number of surveys.
- Define the time period by typing a number of days, weeks or months.

If your administrator has set fatigue management defaults, the **Fatigue Management Options** dialog box displays these settings. If defaults are set to be enforced for all survey campaigns, you are able to specify more restrictive values only.

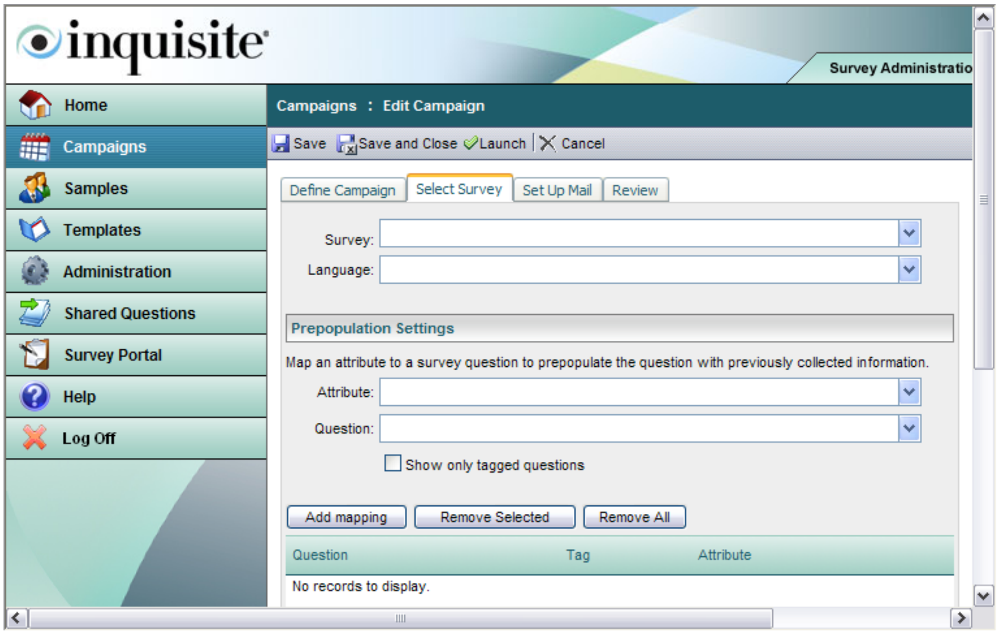
For example, if administrator-set defaults are enforced to exclude respondents who have been invited to 3 or more surveys in the last 2 weeks, you can change the following:

- Change the number of surveys to be fewer than 3 surveys.
- Change the time period to be greater than 2 weeks. For example, **1 month** and **3 weeks** are two possible valid time periods.

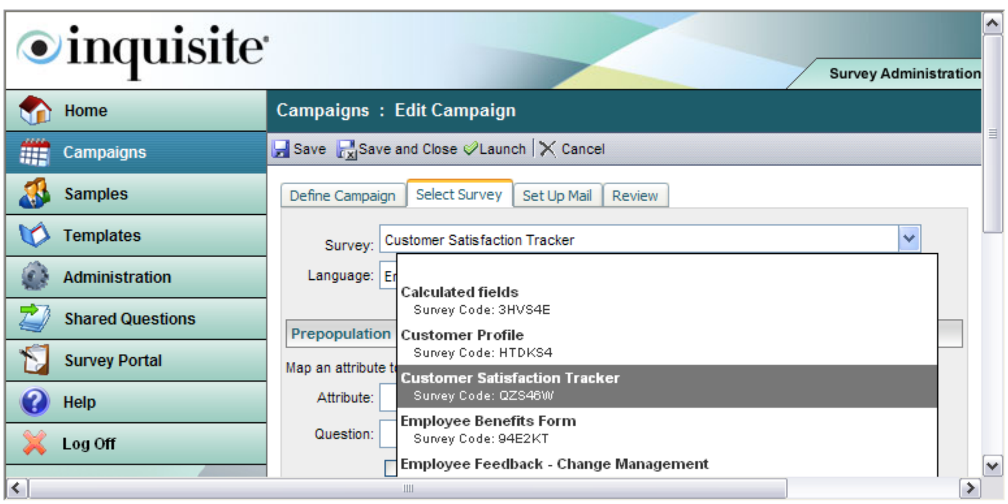
When finished, click **OK**.

7 When finished, click the **Select Survey** tab.

The **Select Survey** page is displayed.



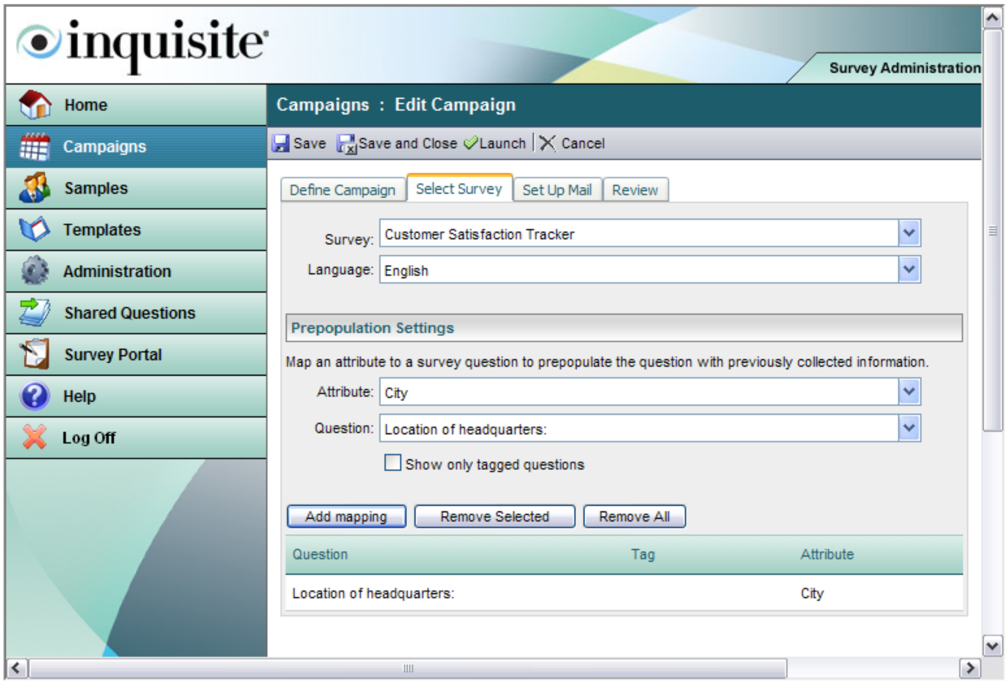

8 Select a survey from the dropdown list. You will see a survey code attached to each survey. This unique string identifies the survey across all Inquisite users at your organization. This code is a useful identifier if you need to troubleshoot issues with your system administrator.




9 If appropriate, select a language from the dropdown list. If you published your survey in multiple languages, the **Language** dropdown will display all of the languages.

10 *Optional step*: For the survey in your campaign, you may want to include data you already have in your database or responses already collected. Prepopulation lets you pass that information into your survey to use when you analyze the survey data.

From the **Attribute** dropdown, select an attribute. Then, select a **Question**. When finished, click **Add mapping**. The newly added mapping is displayed.

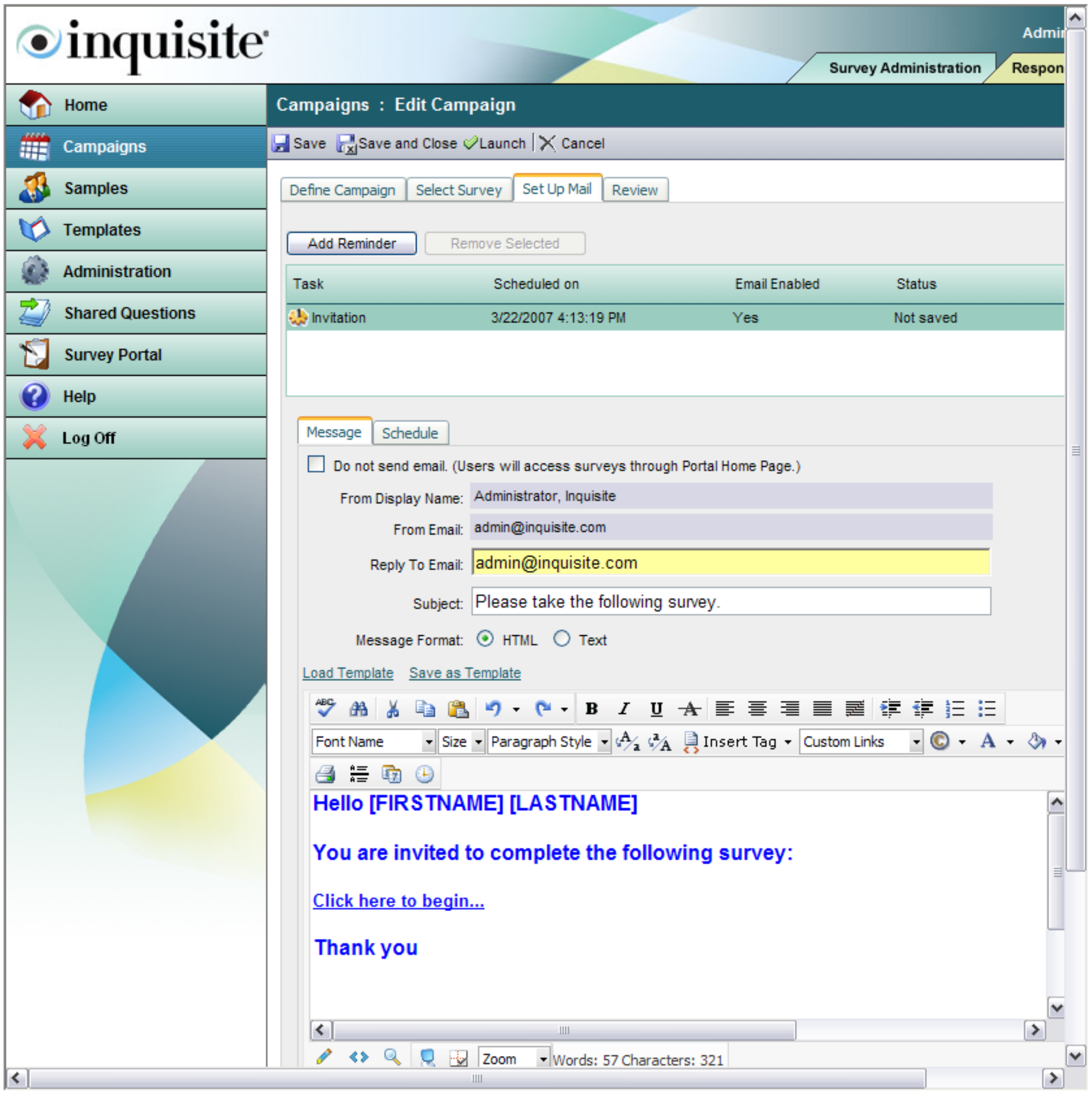



**NOTE**: A question may be tagged when it is created in the Survey Builder. A **question tag** is a unique ID that enables a survey question to be more easily identified. To display only tagged questions in the dropdown, click **Show only tagged questions**.

Continue this process until you have added all of the desired mappings.

**11** When finished, click the **Set Up Mail** tab.

The **Set Up Mail** page is displayed.




Use this screen to write, format and schedule email invitations and reminders to respondents. If you are using a different method to invite respondents to your campaign, check **Do not send email** (below the **Message** tab). Each campaign can have one email invitation and multiple email reminders. The active email (invitation or reminder) is highlighted in the list above the **Message** tab.

**NOTE**: To add a reminder, click **Add Reminder**.

**12** With the **Message** tab selected, use the following options to write and format your email:

- If desired, enter a different **Reply To** email address.
- Enter a subject for the email.
- Select a message format: **HTML** or **Text**.
- Type your email message or use a previously created template to create the email. (After making changes to the current email, you can save it as a template for future use. Click **Save as Template**.)
- Include survey-specific information in your message. To do this, select a survey tag from the **Insert Tag** dropdown list.
- Use the **Custom Links** button to link text in the email message to one or more of the following:

**Survey** includes a link to the survey URL.

**Respondent page** includes a link to the respondent portal. Because the respondent portal requires a user name, instruct respondents to log in with their email address, including a line in your email similar to the following:

**Please log in with this user name: [EMAIL]**
**If you don't have a password, you will be prompted to create one.**

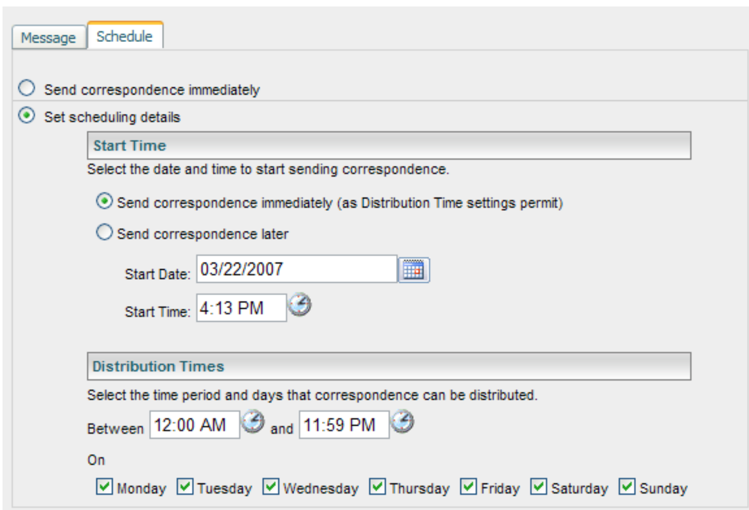
To include the email address in the email, select **Insert Tag>Email**.

**NOTE**: If your respondents do not have email, you may have set up user names instead of email addresses for the respondent portal login. In this case, you will communicate user names through a different channel.

**Opt-out page** includes a link for the respondent to opt out of future email correspondence.

- Perform standard email editing functions, such as spell check and find-and-replace.

**13** To schedule the email, click the **Schedule** tab.

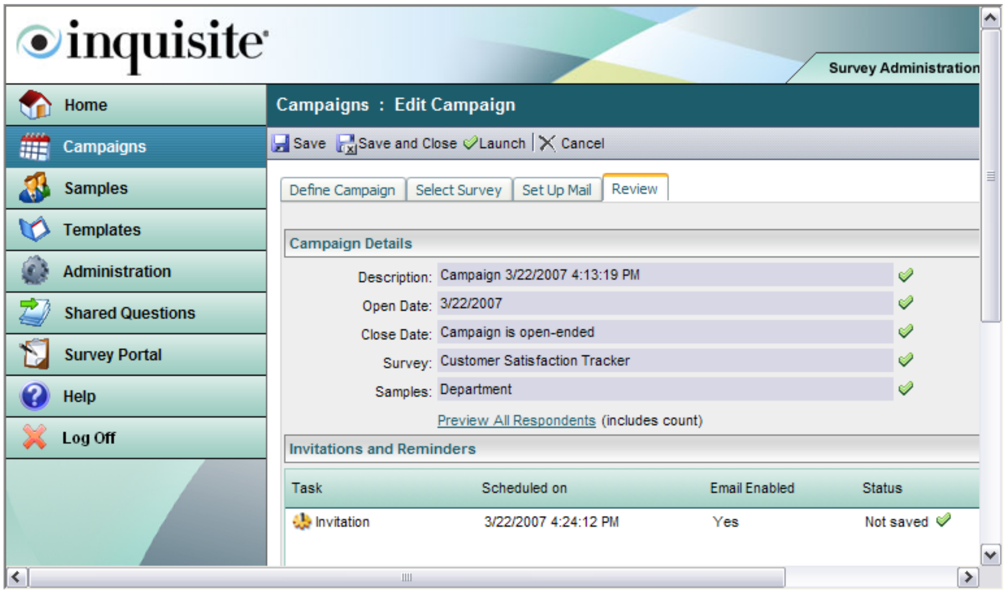



With the **Schedule** tab displayed, you can specify the following:

- To send the email invitation when the survey campaign is launched (based on the open date specified on the **Define Campaign** page), click **Send correspondence immediately**. This is the default setting.
- To schedule the email for a specific date and time, click **Set scheduling details** and specify the following:
- Set a start time.
- Specify distribution times. By default, email correspondence is set to be distributed every day, all day.

**14** When you are finished creating and scheduling the email invitation (or reminder), click the **Review** tab.

The **Review** page is displayed.




15 The **Review** page displays details about the campaign, including information about invitations and reminders. This screen also displays any components your campaign may be missing, such as a sample or survey. To make corrections, return to the desired screen by clicking the tab.

16 When finished, do one of the following:

To save the campaign, click **Save**.

-OR-

To save the campaign and return to the list of campaigns, click **Save and Close**.

-OR-

To enable the campaign, click **Launch**. The RMM makes the survey available on the open date you set on the **Define Campaign** screen.

## Editing a campaign

To make changes to a sample, complete these steps:

1 Log into the RMM.

2 From the left navigation bar, click **Campaign**.

3 The **Campaign** screen displays campaigns you have created. Click the campaign name and then **Edit**. (Double-clicking the campaign name also opens the campaign details.)

4 Details for campaign are displayed. Make the desired changes.

# 5 Tracking a Campaign

Campaign tracking provides details about completed and in-progress surveys. With respondent tracking, you can measure respondent activity and send reminders if necessary. The following table describes available campaign details.

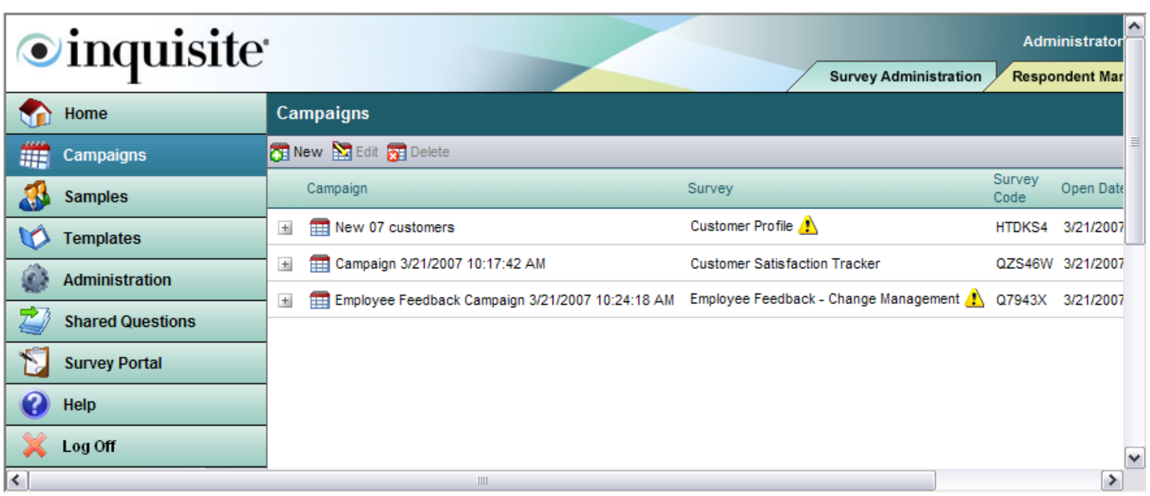
| TRACKING DETAIL | DEFINITION |
|---|---|
| Total in campaign | Total number of respondents scheduled to be included in the survey campaign. |
| Total completed | Total number of surveys completed. |
| **Completion rate** | **Total completed / Total in campaign** |
| Total invited | Total number of respondents who have been invited to take the survey.<br>The **Total invited** may be less than the **Total in campaign** if the campaign includes thousands of respondents. In this case, invitations are delivered in batches to load balance servers. |
| Total not started | The total number of surveys not initiated. |
| Total in progress | Total number of surveys started but not yet finished (and not abandoned). If a respondent remains in progress for a defined period of time without activity, the respondent session will be abandoned. Set the period of inactivity by opening your survey in the Survey Administration tool and selecting **Manage responses>Advanced settings>Days to retain in-progress sessions**. |
| Total abandoned | The total number of respondents who have started but not finished the survey. If a respondent starts a survey but remains inactive for a defined period of time, the Inquisite server “cleans up” that user’s data and terminates that respondent’s session. Set the period of inactivity by opening your survey in the Survey Administration tool and selecting **Manage responses>Advanced settings>Days to retain saved in-progress sessions**. |
| **Response rate** | **(Total completed + Total in progress) / Total in campaign** |

To track a survey campaign's progress, complete these steps:

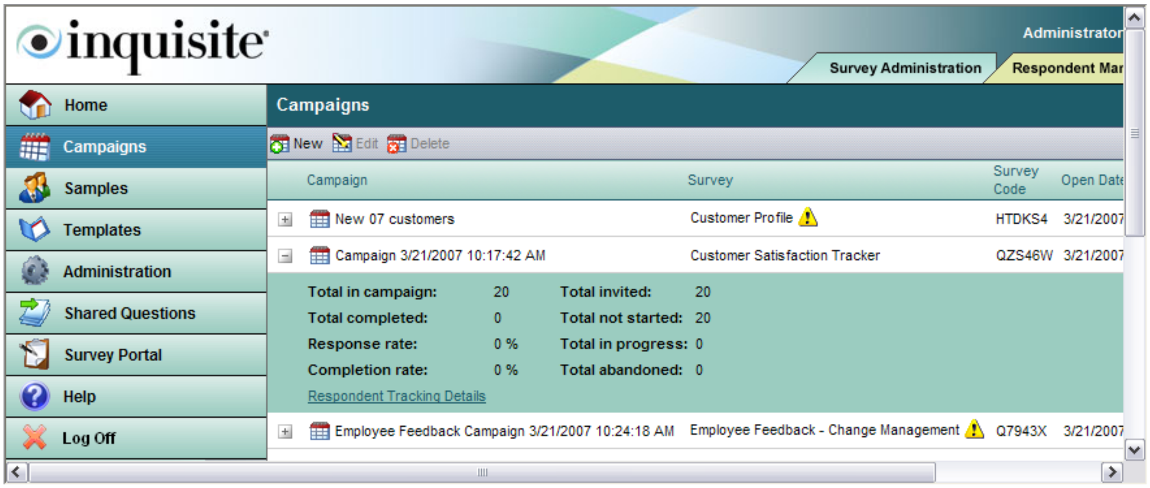
**1** Log into the RMM.

**2** From the **Home** screen, click **Track or manage your campaigns**. You can also click **Campaigns** in the left navigation bar.

The **Campaigns** screen lists all of your survey campaigns.



3 To display tracking details for a campaign, click the plus sign to the left of the campaign name.




### *In-progress campaigns*

When a campaign is launched and in-progress, the RMM tracks respondent-level details. **Respondent-level details** display information about survey response results at the respondent level, letting you send email reminders to respondents who have not yet completed the survey.

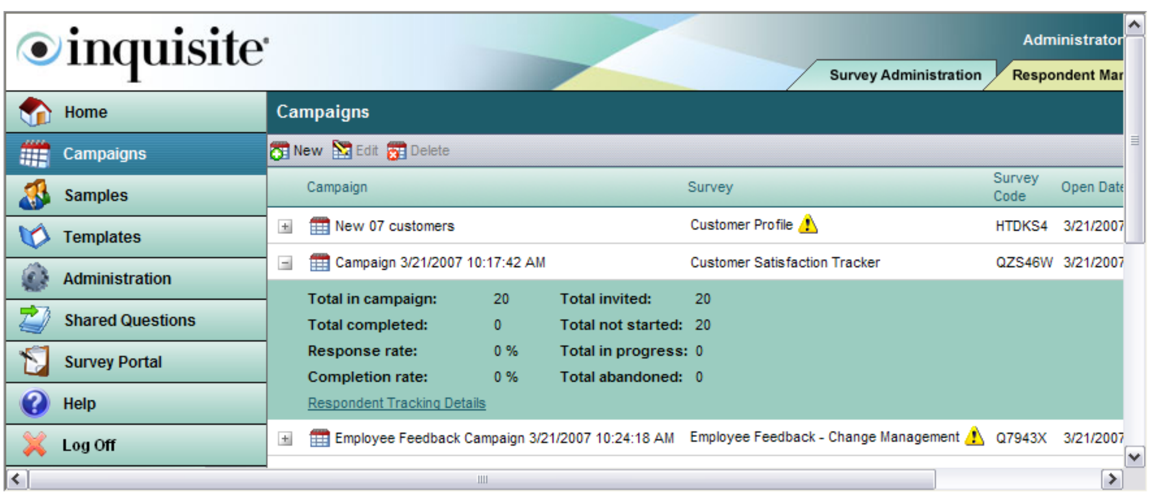
To track respondent-level details for in-progress campaigns, complete these steps:

1 Log into the RMM.

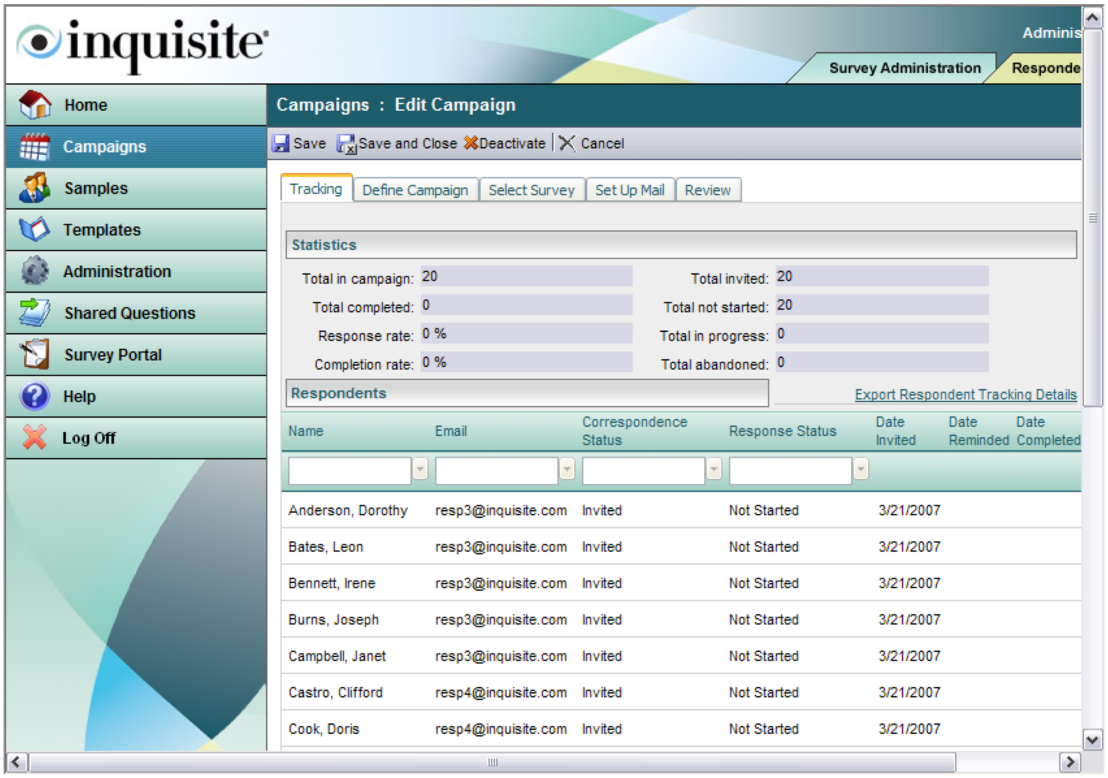
2 From the **Home** screen, click **Track or manage your campaigns**. You can also click **Campaigns** in the left navigation bar.

The **Campaigns** screen lists all of your survey campaigns.

3 Click the plus sign to the left of the in-progress campaign name.




4 To display tracking details about respondents, click **Respondent Tracking Details**. You can also double-click the campaign name.



From the **Tracking** page, use the filters at the column headers to narrow the number of displayed respondents.

For example, to display those respondents who have not yet started the survey, type **Not started** in the text box below **Response Status**. Then, select the **Contains** filter from the down arrow list. The displayed list contains respondents who have not started the survey.

For the **Response Status** box, type one of these options for the filter value:

**Not Started**
**In Progress**
**Completed**
**Abandoned**

To export the details from the **Tracking** page, click **Export Respondent Tracking Details**. Respondent details are exported to a delimited file.

5 To schedule an email reminder, double-click the campaign name and then the **Set Up Mail** tab.

## 6 Creating an Email Template

Use the **Templates** screen to create an email invitation or reminder template for later use. Share templates with others or set them to **private**. You will select a template through the **Set Up Mail** page when you are creating a survey campaign.

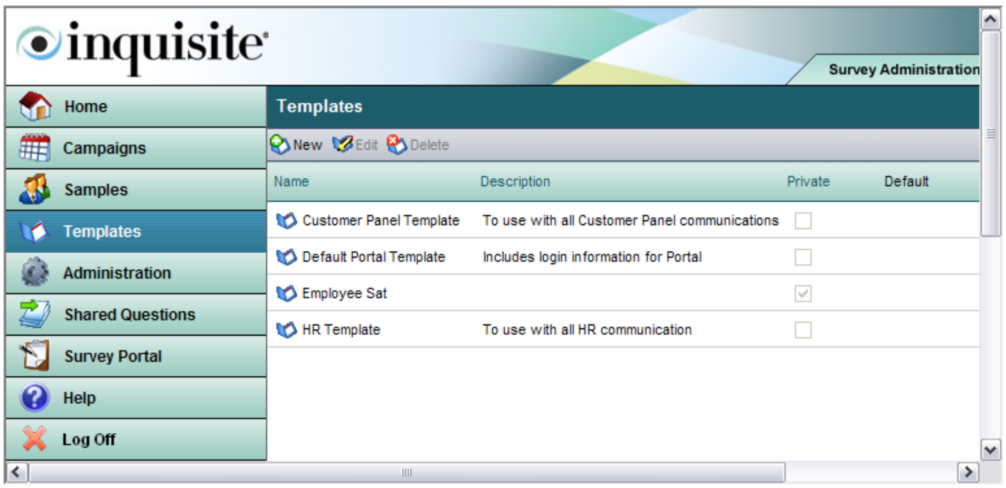
**TIP**: As you create a survey campaign, you can save an email or reminder message as a template for future use. In the **Set Up Mail** page, click **Save as Template**.

To create a new email template to use for invitations or reminders, complete these steps:

**1** Log into the RMM.

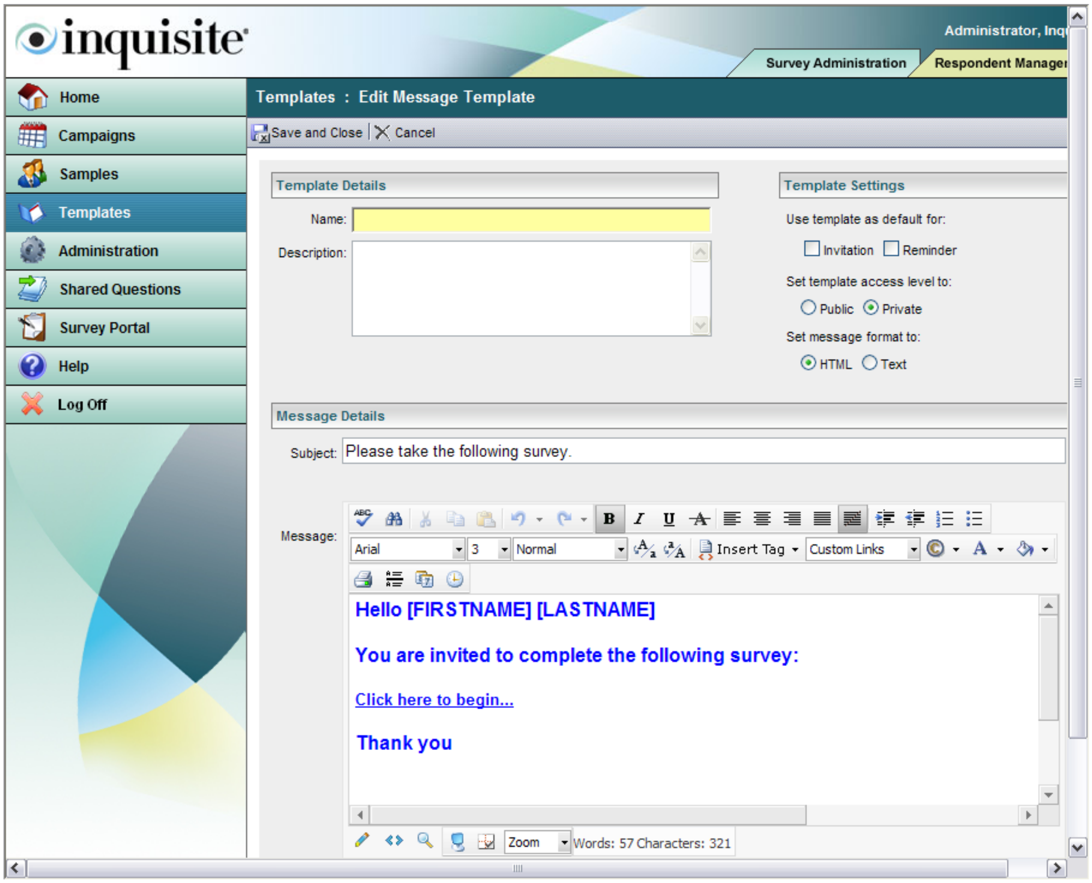
**2** From the left navigation bar, click **Templates**.

The **Templates** screen displays existing email templates.




**3** Click **New**.

The **Templates : Edit Message Template** page is displayed.




Use this page to write and format email invitations and reminders.

**4** Provide a name and description for the template.

**5** Specify whether the template is for an invitation or reminder, or both.

**6** Set the template's access level: **public** or **private**. Selecting **public** provides template access to any survey administrator in your work group.

**7** Select a message format: **HTML** or **Text**.

**8** Type a subject line.

**9** Type the email message.

**10** Include survey-specific information in your message. To do this, select a survey tag from the **Insert Tag** dropdown list.

**11** Use the **Custom Links** button to link text in the email message to one or more of the following:

- **Survey** includes a link to the survey URL.
- **Respondent page** includes a link to the respondent portal. If you provide access to respondent pages, include instructions in your email about logging into the respondent page. For example, you may include a line in your email similar to the following:

  **Please log in with this user name: [EMAIL]**
  **If you don't have a password, you will be prompted to create one.**

Where **[EMAIL]** is the respondent's email address. To include the **[EMAIL]** tag, select **Insert Tag>[EMAIL]**

- **Opt-out page** includes a link for the respondent to opt out of future email correspondence.

**12** Perform standard email editing functions, such as spell check and find-and-replace.

# 7 Creating Shared Questions

**Shared questions** are key metric questions created within the RMM that are available for use in the Survey Builder. Because shared questions are read-only (after being created in the RMM), they can help control the content used in surveys across your organization. Keeping survey questions consistent improves data integrity over time.

The Survey Builder displays the **Shared Questions** library to the left of the survey designer window. To add a shared question to a survey, expand the **Shared Questions** library and drag the desired question into your survey.

**NOTE**: Although read-only, shared questions can be used with the standard Survey Builder features of branching, prepopulation and text replacement.

If you have Inquisite's Employee Appraisal Management (EAM) system, you can track shared questions across applications by bringing survey data into the EAM to include as part of an employee's final appraisal. The survey data is collected through shared questions. Employees may evaluate other employees—peers or their managers—by completing surveys that include shared questions. For customer-facing employees, such as sales or support teams, the customer may complete a survey with shared questions at the end of an engagement. In the EAM, the employee's manager can choose one or more shared questions to include in the appraisal. The appraisal will include the question text, answers and mean scores.

**NOTE**: To be able to create shared questions, you must be an RMM application user with **Survey** or **Site Administrator** rights (set by your Inquisite System Administrator from the Survey Administration site.) RMM site administrators set shared question rights in the **Administration** area of the RMM by selecting **Administration>Manage user profiles**.

Shared questions and their answers can be translated into these languages:

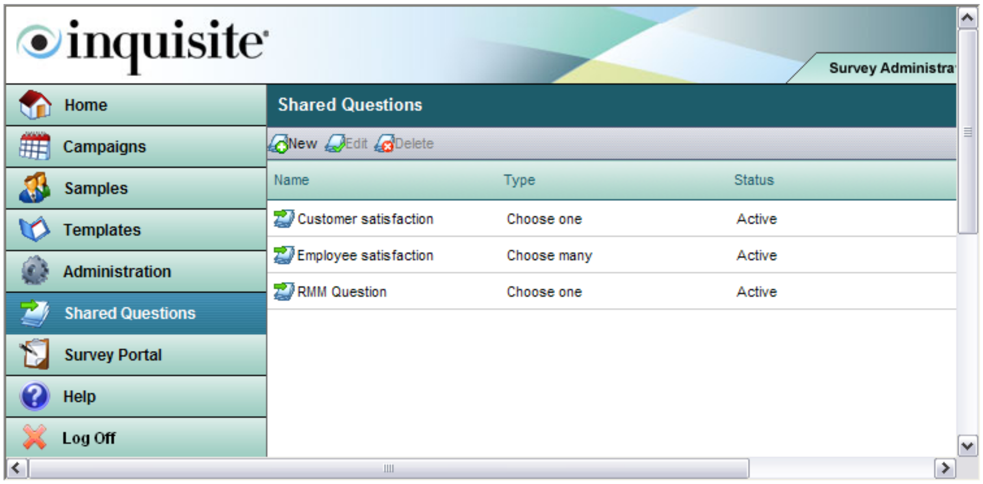
| | | | | |
|---|---|---|---|---|
| Afrikaans | Danish | Hebrew | Malay | Serbian |
| Bulgarian | Dutch | Hungarian | Norwegian | Slowak |
| Catalan | Estonian | Indonesian | Polish | Spanish |
| Chinese | Finnish | Italian | Portugese | Swedish |
| Chinese (Traditional) | French | Japanese | Romanian | Thai |
| Croatian | Greek | Korean | Russian | Turkish |
| Czech | | | | |

To create a shared question, complete these steps:

1 Log into the RMM.

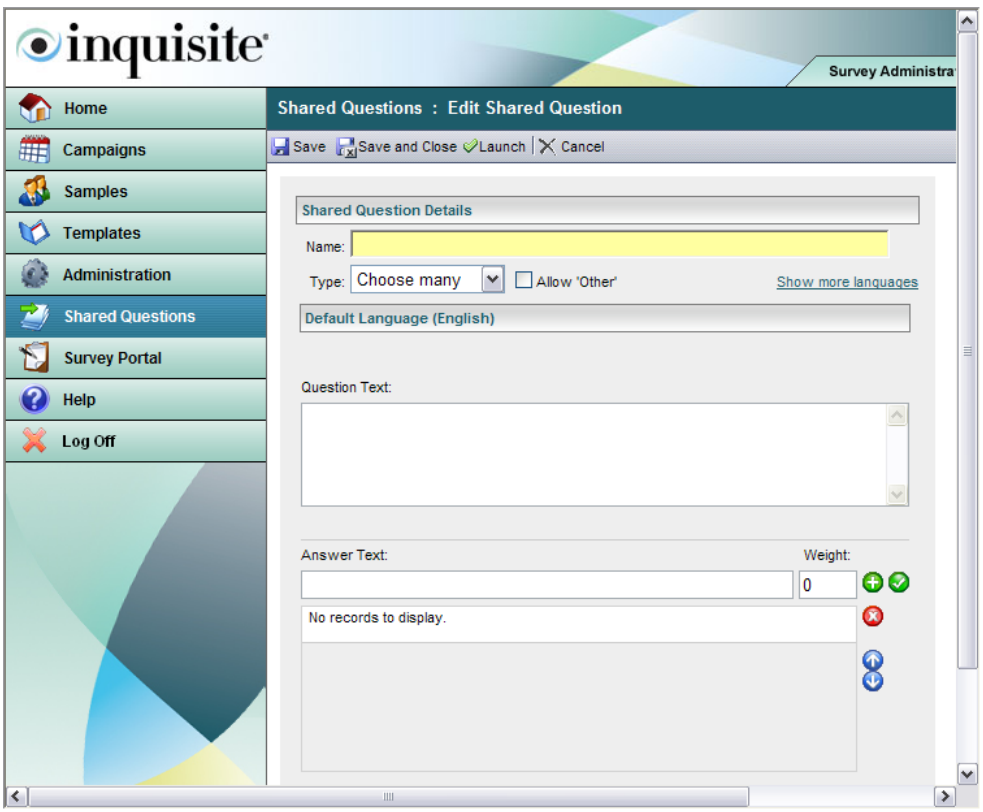
2 From the left navigation bar, click **Shared Questions**.

The **Shared Questions** list displays shared questions that have already been created.




**3** Click **New**.

The **Edit Shared Question** page is displayed.



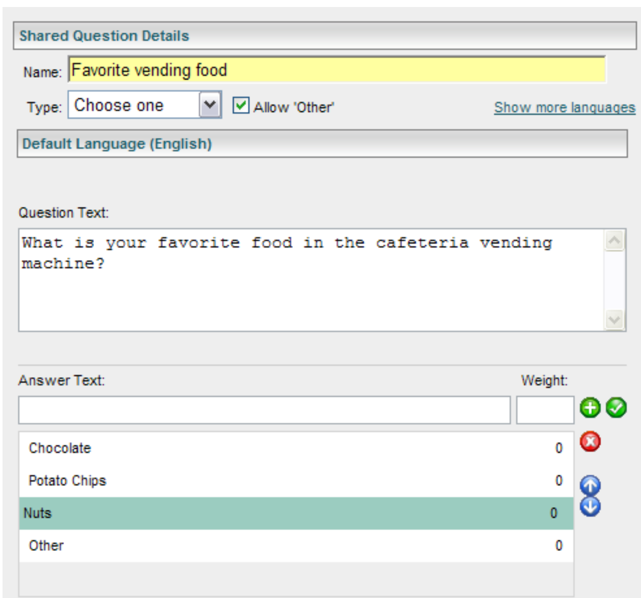

**4** Type a name for the new shared question. The shared question library uses this name as the question's unique identifier.

**5** Select a question type from the dropdown list. Valid question types include: **Choose many**, **Choose one**, **Paragraph**, **Rank**, **Single selection** and **Text**. A shared question's type determines what options are available.

| Options | Question types | | | | | |
|---|---|---|---|---|---|---|
| | **Choose many** | **Choose one** | **Paragraph** | **Rank** | **Single selection** | **Text** |
| Question text | X | X | X | X | X | X |
| Answers | X | X | | X | | |
| Allow “Other” | X | X | | X | | |
| Validation | | | | | | Text, Numeric or Date |

**6** In the **Question Text** box, type the question.

**7** For **Choose many**, **Choose one** and **Rank** questions, type answers in the **Answer Text** box, clicking the Plus sign to add the answer after each entry.

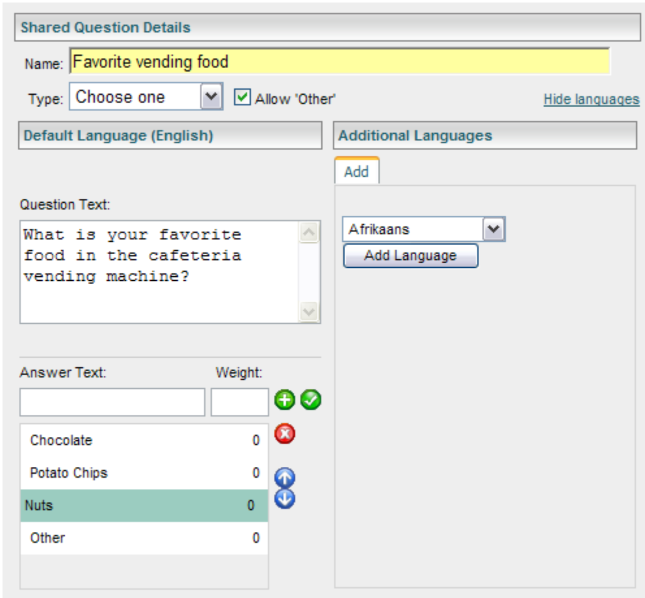



To reorder the answers, select the desired answer and click the Up or Down Arrows.

To delete an answer, click **X**.

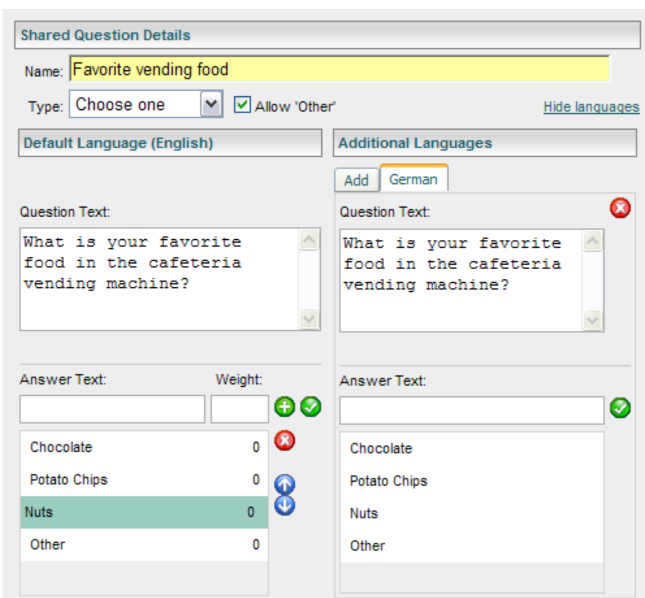
To give a weight to an answer, type a value in the **Weight** box. Weights are used to calculate mean scores. For example, a mean score of 3.5 on a 6-point satisfaction scale can be interpreted to be an average score between **neutral** and **somewhat satisfied**.

**8** To add a language to the shared question, click **Show more languages**. Otherwise, skip to step 12.




**9** Select the desired language from the dropdown and click **Add Language**.

Question text and answers in the default language are displayed in the **Question Text** and answers boxes for the new language.




**10** Translate the question and answers. To edit the answers, select the answer. When the answer is displayed in the **Answer Text** box, make the desired changes and then click the Update check.

Typically, for languages with character sets other than English, you will copy and paste the question and answer text for the new language from another file. Alternately, you may change your input language on your computer.

**11** To delete the language from the shared question, click **X**.

**12** When finished, save the shared question.

To save the question and continue working on the shared question, click **Save**.

-OR-

To save the question and return to the **Shared Question** list, click **Save and Close**.

-OR-

To make the shared question available in the Survey Builder, click **Launch**.

To edit a shared question, complete these steps:

1. Log into the RMM.
2. From the left navigation bar, click **Shared Questions**.
3. The **Shared Questions** list displays shared questions that have already been created. Select the name of the shared question that you want to edit and click **Edit**. (Or, double-click the shared question.)
4. The **Edit Shared Question** page displays details about the shared question.

   If a shared question has not been launched, you can make any edit to the shared question, including name and type and adding a language.

   If a shared question has been launched, you can edit the **Question Text** and the **Answer Text**. To change the question, type in the **Question Text** box. To change an answer, first click the answer. When the answer is displayed in the **Answer Text** box, make the desired changes and then click the check.

   **NOTES**: After a shared question is launched, you cannot change its type or add, delete or reorder an answer. You **can** add a new language to a shared question after it is launched.

   Additionally, in the Survey Builder you can change a single-select or multi-select question's display type. For single-select questions, display types include radio button, dropdown or checkbox. For multi-select questions, display types include checkbox or list box.

5. To add a language to the shared question, click **Show more languages**. Otherwise, skip to step 8.
6. Select the desired language from the dropdown and click **Add Language**.

   Question text and answers in the default language are displayed in the **Question Text** and answers boxes for the new language.

7. Translate the question and answers. To edit the answers, select the answer. When the answer is displayed in the **Answer Text** box, make the desired changes and then click the check.

   Typically, for languages with character sets other than English, you will copy and paste the question and answer text for the new language from another file. Alternately, you may change your input language on your computer.

8. When finished, save the question.

   To save the question and continue working on the shared question, click **Save**.

   -OR-

   To save the question and return to the **Shared Questions** list, click **Save and Close**.

   -OR-

   To make the shared question available for inclusion in the Survey Builder, click **Launch**.

To delete a shared question, complete these steps:

1. Log into the RMM.
2. From the left navigation bar, click **Shared Questions**.

3 The **Shared Questions** list displays shared questions that have been created. Select the name of the shared question that you want to delete and click **Delete**.

**NOTE**: If you delete a shared question that is in an active survey campaign, response data will continue to be collected for the question, but you will be unable to monitor results for the question across surveys and over time (a benefit of shared questions). Additionally, the shared question will no longer be available from within the Survey Builder.

# 8 Managing Users in the RMM

RMM site administrators can perform the following maintenance tasks from the RMM **Administration** window:

- Manage user profiles, including resetting passwords and assigning application user roles within the RMM.
- Manage the opt-out list.
- Set fatigue management defaults.

## Managing user profiles

The **User Profile** screen lets you manage profiles for RMM users. The following table describes level of access by user.

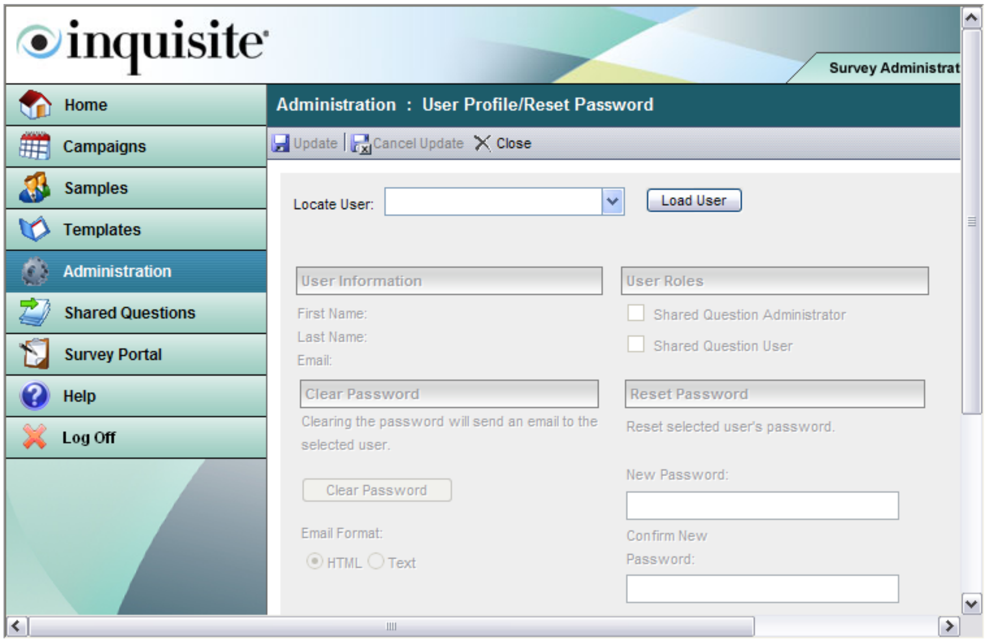
| USER | | ACCESS |
|---|---|---|
| **Respondent** | | Logs into the RMM to take a survey. Panels consist of respondents. |
| **Application User** | **Survey Administrator** | ▪ Manages samples.<br>▪ Launches survey campaigns.<br>▪ Creates email invitation and reminder templates.<br>▪ With permissions set by the site administrator, can manage and use shared questions. |
| | **Site Administrator** | ▪ Imports and updates population data.<br>▪ Creates custom attributes.<br>▪ Manages user profiles, including setting access rights for creating and using shared questions.<br>▪ Manages email list settings, including adding and removing users from the email opt-out list and setting fatigue management defaults. |
| | **Analyst** | ▪ Accesses online reports.<br>▪ Uses the Reporting Plug-in. |

Your Inquisite System Administrator sets **Survey** and **Site Administrator** rights at:

**System Administration>Account Administration>Account Privileges**

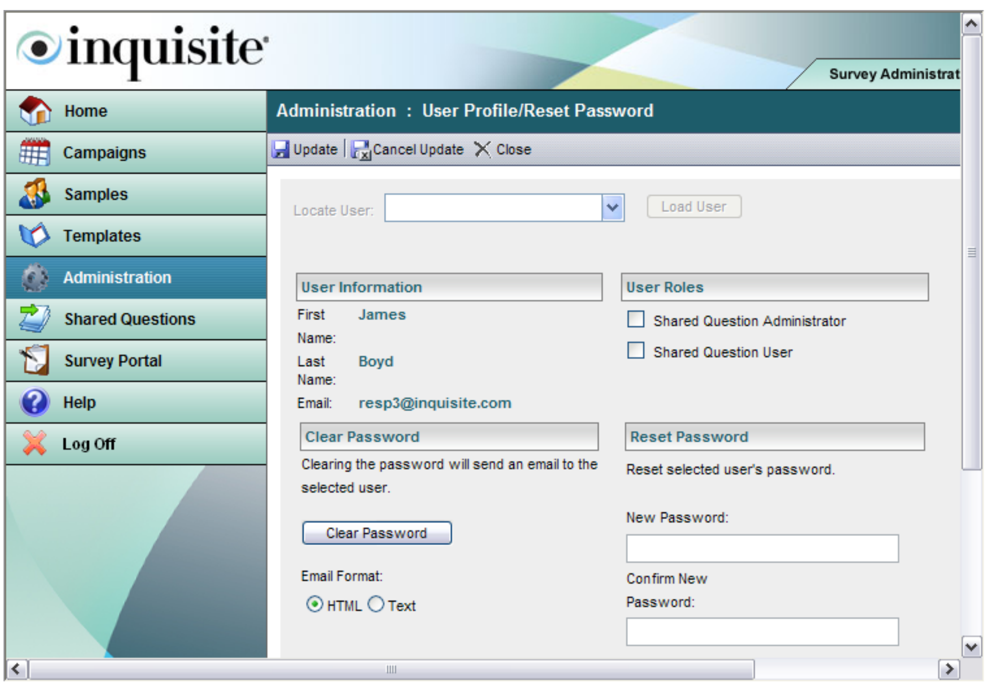
To update a user's profile, complete these steps:

1 From the **Administration** screen, click **Manage user profiles**.




2 Locate the desired user by clicking the **Locate User** down arrow and then **Load User**. All users who have login capability—respondents and application users—can be located and loaded.

The user's name and email are displayed below **User Information**.




3 To give a user access to the **Shared Questions** screen, assign the appropriate role. A **Shared Question Administrator** has permission to create and delete shared questions. A **Shared Question User** can access the shared question library to include shared questions in a survey. You can assign one or both roles to a user.

**NOTE**: Grant shared question access to RMM application users only.

**4** To clear a respondent's password and send an email to the respondent, select an email format (**HTML** or **Text**) and click **Clear Password**. (This option is not available for application users.)

-OR-

If a user has no email address in the system, you can reset the password by typing the new password in the **New Password** and **Confirm New Password** boxes. Resetting an application user's password in the RMM changes it in the Survey Administration site also.

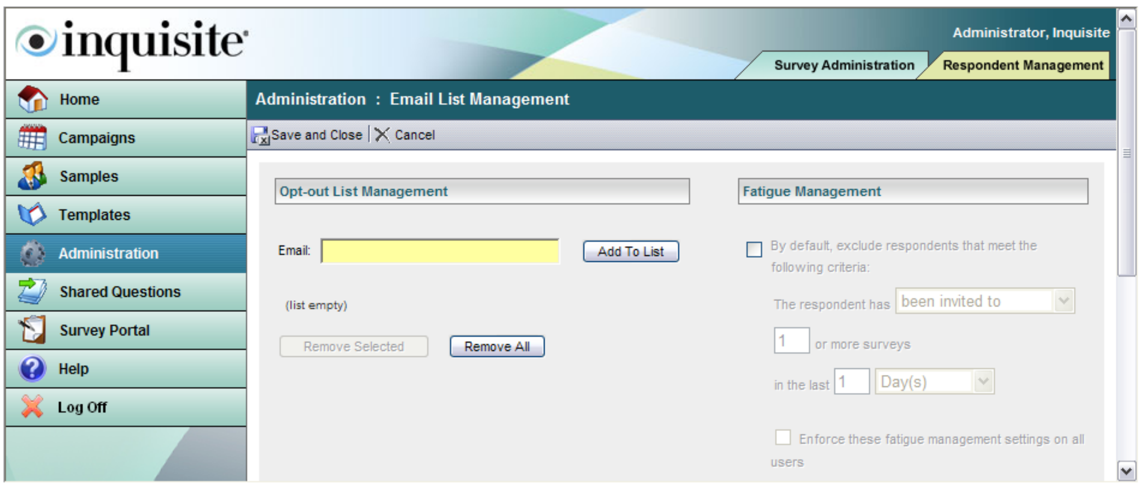
**NOTE**: If a respondent has no password stored in the RMM, that respondent will also be able to set a password by linking to the portal from an invitation.

## Managing the opt-out list

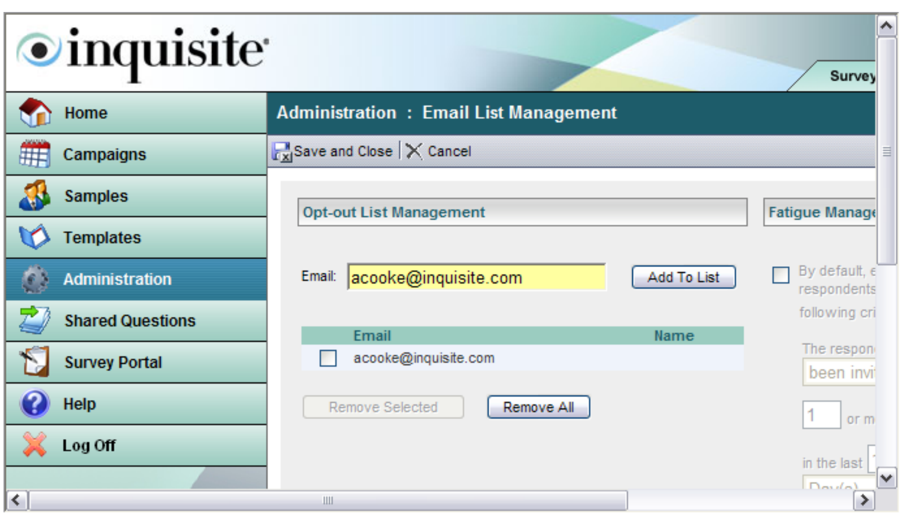
Respondents clicking the opt-out link in a survey invitation are excluded from all future emails. To manually add or remove respondents from the opt-out list, complete these steps:

**1** From the **Administration** screen, click **Manage email list settings**.

The **Email List Management** screen displays opt-out and fatigue management options.




**2** Under **Opt-out List Management** in the **Email** field, type the email of the user who wants to opt out of future emails and then **Add To List**.



3 To remove a user from the opt-out list, check the user's email and click **Remove Selected**.

4 When finished, click **Save and Close**.

## Setting fatigue management defaults

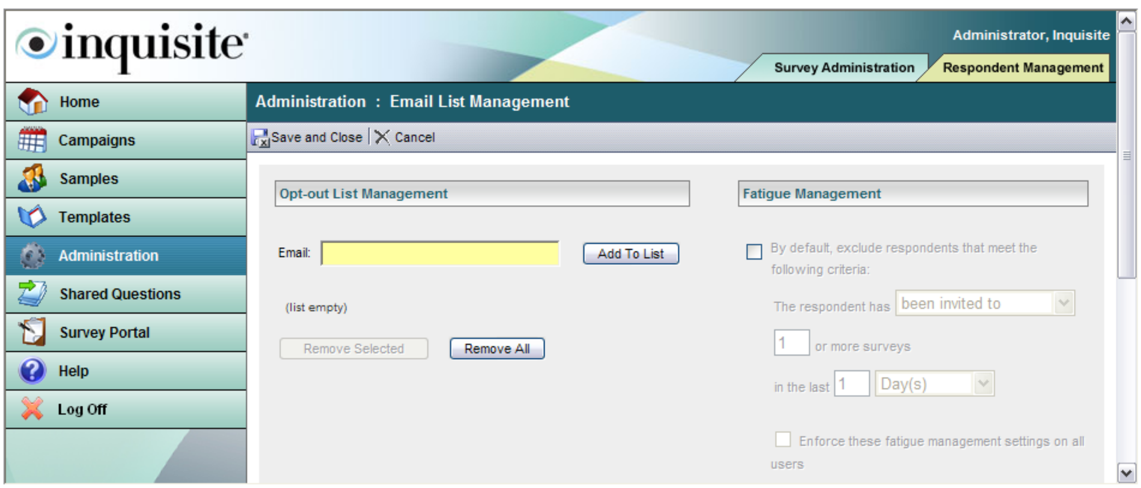
Fatigue management options let you control for survey fatigue among your respondents. As site administrator, you can specify defaults that are set whenever a survey administrator creates a new campaign. With defaults set, survey administrators can change or turn off fatigue management settings for an individual campaign.

To enforce the defaults, select **Enforce these fatigue management settings on all users**. If defaults are set to be enforced for all survey campaigns, survey administrators are able to specify more restrictive values only. For example, if you set defaults to be enforced to exclude respondents who have been invited to 3 or more surveys in the last 2 weeks, survey administrators can change the following:

- Change the number of surveys to be fewer than 3 surveys.
- Change the time period to be greater than 2 weeks. For example, **1 month** and **3 weeks** are two possible valid time periods.

To set fatigue management defaults that apply to all campaigns, complete these steps:

1 From the **Administration** screen, click **Manage email list settings**.




2 Under **Fatigue Management**, check **By default, exclude respondents that meet the following criteria**.

3 Define the criteria by which to exclude respondents:

- Select from **been invited to** or **completed**.
- Type the number of surveys.
- Define the time period by typing a number of days, weeks or months.

4 To enforce settings for all campaigns, check **Enforce these fatigue management settings on all users**.

With settings enforced, fatigue management can be made more restrictive only when an individual campaign is defined.

5 When finished, click **Save and Close**.

## Troubleshooting

Use this section as a guide to troubleshooting unexpected issues with the RMM. If you are unable to resolve the issue with the information presented here, contact Inquisite technical support at:

support@inquisite.com

512.328.2943

### System information

Web server and application server files that the RMM uses are displayed from the **Administration** window. Inquisite Support may request these files to help perform troubleshooting.

To view the web server and application server files, complete these steps:

**1** Log into the RMM.

**2** From the left navigation bar, click **Administration**.

**3** Click **View system information**.


**4** To display all of the files without scrollbars, click **Printer Friendly Version**.

## Managing application users

If you are surveying employees at your organization, include all of your application users in the population. To do this, use the RMM's **Data Import** function to import the application user, ensuring that the application user's email address serves as *UserName* for the import.

When an application user is imported in this way, you will be able to include that user in a dynamic sample (a sample that is filtered on custom attributes).

Application users log into the RMM to manage samples and survey campaigns (as **survey administrators**); or to perform administrative tasks in the RMM (as **site administrators**).

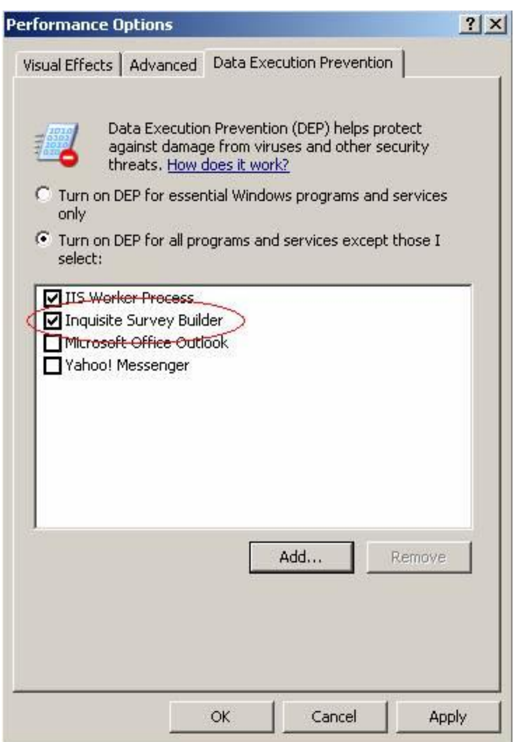
**NOTE**: Because an application user's account is managed through the RMM and the Survey Administration site, ensure that you maintain the account in both places.

## Shared question access in the Survey Builder

The operating system's Data Execution Prevention (DEP) setting may prevent the Survey Builder from loading the list of shared questions. If you cannot see shared questions in the Survey Builder, change your operating system's DEP setting as follows:

1. Open your computer's System Properties dialog box: **Start menu>***right-click* **My Computer>Properties**.
2. From your computer's **System Properties** dialog box, click the **Advanced** tab.
3. Under **Performance**, click **Settings**.

   The **Performance Options** dialog box is displayed.
4. Click **Data Execution Prevention**.
5. If **Turn on DEP for all programs and services except those I select** is enabled, click **Add**.
6. Navigate to **QBuilder.exe** and select it. By default, **QBuilder.exe** is located in **C:\Program Files\InquisiteFolder**.



## Pop-up dialog boxes

Moving a pop-up dialog box off the top of the screen may result in the dialog box locking and freezing the application. An example of a pop-up dialog box is the **Preview Attribute Values** dialog you can open when selecting filters for a dynamic sample.

**Workaround**: Do not move a pop-up dialog box off the top of the RMM window.

## Focus in editable areas

Clicking the Backspace key when your cursor is not in an editable area causes the browser to go back to the previous screen, behaving as though you clicked the browser's **Back** button. This may cause you to lose changes in the first screen.

**Workaround**: Ensure that your cursor is active in an editable area before selecting the Backspace key.

## RMM log files

The RMM logs information daily for three RMM services:

- The bridge service logs to bridge_svc*date*.txt
- The event service logs to event_svc*date*.txt
- The transport service logs to transport_svc*date*.txt

The logs are written to the log folder in the Inquisite installation. You can also view the logs from the Inquisite System Administration site.

To set the logging level, use the **Configure Services Startup** dialog box from the Inquisite installation. You may use these logs to perform troubleshooting.

## Skins

The Inquisite System Administration site lets you change Inquisite's online skin (or look-and-feel). If you select a new skin with the RMM installed, you will no longer see the **Respondent Management** tab from the Survey Administration site. To display the **Respondent Management** tab, select **Inquisite8.skn** from the **Change Skin** dropdown.

# Glossary

**Campaign**

Survey project in which you invite one or more samples to complete a specified survey.

**Choose many question type**

Lets respondents select more than one of the available choices. This question type supports an optional **Other** field, in which respondents can type a different choice than provided.

**Choose one question type**

Forces respondents to select one answer from a small set of possible available choices. This question type supports an optional **Other** field, in which respondents can type a different choice than provided.

**Completion rate**

Campaign tracking detail: **Total completed / Total in campaign**

**Dynamic sample**

A sample of respondents created by filtering the population. If changes are made to the database when the survey campaign is launched, the sample is updated automatically to reflect these database changes.

**Fatigue management**

RMM settings that let you control for survey fatigue among respondents. See also *survey fatigue*.

**Filtering criteria**

Starts with the entire population and narrows the size of the sample. For example, to define a sample of all sales representatives, you might select *Position* equals *Sales Representative* for one filtering rule. To narrow the sample further, define additional filtering rules.

**Imported static sample**

A sample of respondents that does not change. You may import a static sample as part of follow-up to an event, for which you are soliciting event feedback.

**Paragraph question type**

Supports 32,000 characters. A **Paragraph** question encourages respondents to provide more extensive information than will fit in a **Text** question.

**Population**

The entire database of potential respondents accessible when you create a sample. A sample is a subset of the population.

**Prepopulation**

Lets you pass database data or previously collected information into your survey by mapping an attribute to a survey question. For example, your database may already include a respondent's *Job Title*. Mapping the *Job Title* database field to the *Job Title* survey question passes the information into the survey results without requiring the respondent to answer the survey question.

In the Inquisite Survey Builder, you can hide a prepopulated survey question but still pass that information to the survey to use it for analysis. Hiding questions is useful for keeping sensitive information, such as salary, confidential.

**Question tag**

Field that attaches a unique identifier to a question. A question tag must be 16 alphanumeric characters or fewer.

**Random sample options**

Process of selecting a random subset of the samples to invite to a campaign.

**Rank question type**

Lets respondents indicate a preference for or rank available choices. A rank of 1 is the most preferred of available choices. Each choice has a button next to it. Respondents click the button to rank the choice from 1 to *n*, where *n* is the number of choices.

**Response rate**

Campaign tracking statistic: **(Total completed + Total in progress) / Total in campaign**. If your survey is going out to thousands of respondents, it is likely that the survey invitations will be sent in batches. If a campaign includes 10,000 respondents, the number of respondents invited immediately after you launch the campaign is fewer than 10,000.

**Sample**

Groups of respondents you invite to take a survey. A sample is a subset of the entire population or can be imported.

**Segmentation**

Filters your database to create samples from subsets of your database population, letting you survey the demographic you need to reach. For example, you may want to survey only regional sales managers in a specific geographic area. To accomplish this, you will first define the sample of respondents. Typically, you will then select one or more filtering criteria and create the sample. Because this dynamic sample is linked to the database, the sample is updated at survey launch time to reflect any changes in the database.

**Shared questions**

Key metric questions created in the RMM that are available for use in the Survey Builder. Because shared questions are read-only (after being created in the RMM), they can help control the content used in surveys across your organization. Keeping survey questions consistent improves data integrity over time.

**Single selection question type**

Use for **yes**/**no** questions.

**Static sample**

A respondent sample that does not change. You can create a static sample in one of three ways:

- Manually adding respondents to or deleting respondents from a sample.
- Converting a dynamic sample to a static sample.

  **NOTE**: you cannot convert a static sample back to a dynamic sample.

- Importing a delimited file as an imported static sample.

**Survey code**

Unique string that identifies the survey across all Inquisite users at your organization. This code is a useful identifier if you need to troubleshoot issues with your system administrator.

**Survey fatigue**

Situation in which respondents who have been surveyed frequently in a short time period become less likely to respond with each additional survey they receive. See also *fatigue management*.

**Text question type**

Collects short text, such as demographic information (a respondent’s name and address). A **text** question is restricted to 255 characters. For longer answers, use a **Paragraph** question.

**Total abandoned**

Campaign tracking statistic: The total number of respondents who have started but not finished the survey. If a respondent starts a survey but remains inactive for a defined period of time, the Inquisite server "cleans up" that respondent's data and terminates the session.

**Total completed**

Campaign tracking statistic: The total number of surveys completed.

**Total in campaign**

Campaign tracking statistic: The total number of respondents who are scheduled to be included in the survey campaign.

**Total in progress**

Campaign tracking statistic: The total number of surveys started but not yet finished (and not abandoned). If a respondent remains in progress for a defined period of time without activity, the respondent session is abandoned.

**Total invited**

Campaign tracking statistic: The total number of respondents who have been invited to take the survey. The **Total invited** may be smaller than the **Total in campaign** if the campaign includes thousands of respondents. When the campaign is launched, the invitations are delivered in several batches to load balance servers.

**Total not started**

Campaign tracking statistic: The total number of surveys not initiated.

# Index